Anthony Lewis, MBA, AWMA®, CFP®

Assistant Vice President, Trust Officer/ Wealth Advisor

As a Trust Officer, Tony is a fiduciary advisor for trust administration operating without bias in managing and distributing your trust property, while maintaining your and your beneficiaries' best interest. He has been a CFP professional for over 10 years. The designation comes with extensive training in financial planning, estate planning, insurance, investments, taxes, employee benefits and retirement planning.

Experience

Legacy Trust, 2018 – present
Fifth Third Private Bank, 2013 – 2018
Johnson Bank, 2012 – 2013
Fidelity Investments, 2009 – 2012
United States Naval Reserves, 1990 - 2006

Certification

Certified Financial Planner ™
Accredited Wealth Management Advisor ℠

Education

B.S.B.A., The Ohio State University
MBA, Grand Valley State University

Community Involvement

The American Legion - Member