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Matthew is a Founding Partner and Private Wealth Advisor at Advocus Private Wealth.

As a Founding Partner and Private Wealth Advisor at Advocus, Matthew provides customized advice to assist clients in strategically navigating a broad array of opportunities and complexities associated with significant wealth. He provides holistic guidance to help clients gain confidence and comfort in evaluating financial decisions relative to their personal preferences and goals. Matthew strives to empower clients to be informed, capable stewards of their wealth over multiple generations. He is experienced in providing integrated wealth advisory services to C-suite corporate executives, entrepreneurs, professional athletes, and high net worth clientele with distinctive needs and priorities.

He began his financial services career in 2002 and is a CERTIFIED FINANCIAL PLANNER (CFP®) practitioner and a Certified Private Wealth Advisor (CPWA®) professional, a designation issued by the Investments & Wealth Institute in conjunction with The University of Chicago Booth School of Business. Matthew is a member of the Financial Planning Association, the Investments & Wealth Institute, and the Professional Council of the Columbus Foundation. He is a two-time graduate of Capital University, earning a BA in Business Administration and an MBA, both with concentrations in Finance.

Matthew is active with numerous charitable endeavors. He lives in Upper Arlington, Ohio with his wife and two children.

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