ADVOCUS
PRIVATE WEALTH

MATTHEW ANDERSON, CFP®, CPWA®

Founding Partner | Private Wealth Advisor

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

Prior to founding Advocus, Matthew spent a decade within the Private Wealth division of Merrill Lynch as a Vice President and Private Wealth Relationship Manager on one of the largest teams in the country. He began his financial services career in 2002 as a financial advisor and gained professional experience as a banking officer and in hedge fund valuation. He is a CERTIFIED FINANCIAL PLANNER™ practitioner and a Certified Private Wealth Advisor® 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.

Matthew is a two-time graduate of Capital University, earning Bachelor's and Master's degrees in Business Administration, both with concentrations in Finance. He is active in numerous charitable endeavors and resides in Upper Arlington, Ohio with his wife and two children.

577 W Nationwide Blvd, Suite 302
Columbus, Ohio 43215

manderson@advocuspw.com

614.372.5756

Let's connect!

PROFESSIONAL DESIGNATIONS AND EDUCATION

- Certified Private Wealth Advisor® professional (CPWA®), University of Chicago
- CERTIFIED FINANCIAL PLANNER™ practitioner (CFP®), College for Financial Planning
- Master of Business Administration – Finance, Capital University
- Bachelor of Science, Business Administration – Finance, Capital University

PROFESSIONAL INVOLVEMENT

- Member, Financial Planning Association
- Member, Investments & Wealth Institute
- Member, Professional Council of the Columbus Foundation