Bluestone Wealth Partners

Sound Financial Planning Helps Executives and Professionals Accumulate, Preserve and Share Wealth

Armed with a thorough understanding of compensation and retirement plans and the changing regulations that govern them, Bluestone Wealth Partners has become the 'go-to' firm for corporate executives, professionals and business owners.

Headquartered in Columbus, Ohio, BWP was founded in 2015 by four veteran registered representatives of Lincoln Financial Advisors: Richard J. Martin, MS, CFP®; Michael J. Agriesti, CFP®, CRPC®, LUTCF®; Andrew L. Michel, CLU®, ChFC®; and R. Michael O'Brien, CFP®, CRPC®, CRPS®. Having worked in the industry for 20 to 30 years, this financial planning "dream team" already enjoyed a reputation for excellence in the areas of asset management, business continuity and wealth transfer strategies.

"Each of us operate independently, focusing on solving problems unique to corporate executives, business owners and high-net-worth clients," says Martin, the author of articles on financial planning for investors and a thought-leader in building financial planning practices.

Richard J. Martin, MS, CFP® • Jeffrey D. Lammert, CFP®
Sam Chickerella, CFP® • G. Adam Weingartner, CFA® • Adam Pusateri, CFP®
R. Michael O'Brien, CFP®, CRPC®, CRPS® • Andrew L. Michel, CLU®, ChFC®
Michael J. Agriesti, CFP®, CRPC®, LUTCF®

"While we changed our name and office location, our choice of LFA (Lincoln Financial Advisors) as our broker/dealer never wavered," adds Agriesti. "We wholeheartedly embrace LFA's philosophy – Service - First, Last and Always℠. We serve each client as if he or she were our only client. That is the primary reason many of our clients become partners for life."

Today, BWP is one of the ten largest fee-based financial planning firms in Central Ohio.* It has grown to include eight partners and 16 other financial professionals and support staff. The firm provides retirement, estate and business succession planning, as well as related estate tax, investment and insurance strategies.

Your Personal CFO

"Our clientele calls for a sophisticated level of service," says Michel. "They are successful, driven and competent. But few have the inclination or the luxury of time needed to stay abreast of changes in the market, the regulatory environment, shifting tax codes and more."

Most BWP clients already have long-term relationships with other advisors. Their attorneys, CPAs and others have drawn up wills, trusts, business agreements, retirement plans, etc. "We work closely with these trusted advisers to make sure each document, insurance policy and other financial strategies are working in a coordinated way," says O'Brien. "We can also tap subject matter experts and nationwide intellectual capital to handle complex matters as needed."

BWP is focused and deep. Each of its partners are focused on niche markets including corporate executives, business owners and high net-worth families and individuals. It offers a depth of services and personal relationships that can last decades, including the retirement years.

"Our goal is to help clients make the most of their income and assets. So we work with them to make plans for wise investing, saving for intermediate and long-term goals, creating meaningful legacies and seizing appropriate opportunities such as employee stock options," says Martin. "Then we go the extra mile, working hand in hand with them until all the details have been completed. Our tagline explains it best – 'Where know-how meets here's-how.'"

A Snapshot of Your Financial Life
Bluestone Wealth Partners' secure client portal is accessible from any device and allows each client to see and organize all assets in one place.

* Assets under management - *Columbus* Monthly's Book of Lists, 2017

BLUESTONE WEALTH PARTNERS

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