

NEWS

For Immediate Release

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Blue Chip Partners Named a Top Registered Investment Advisory Firm in Michigan by Forbes

Plus, leading wealth management firm launches new educational podcast and investment review series

FARMINGTON HILLS, MI (December 11, 2023) – [Blue Chip Partners \(“Blue Chip”\)](#), an award-winning, independent Registered Investment Advisor (RIA) and comprehensive wealth management firm located just outside of Detroit, was recently named one of the top RIA firms in Michigan by *Forbes* and SHOOK Research.

In the 2023 list of [America’s Top RIA Firms](#), Blue Chip was ranked #10 in Michigan and #215 nationally. Earlier this year, CEO [Robert Steinberg](#) and Managing Partner [Dan Seder](#) were included in *Forbes*’ 2023 list of [Best-in-State Wealth Advisors](#), ranking #17 and #18 respectively in the state of Michigan.

“Being included in this industry-leading ranking is a huge honor for us,” said Robert Steinberg, Founder and CEO of Blue Chip Partners. “Special thanks to our awesome team members who provide such excellent service to our clients and allow us to qualify for awards and rankings like this.”

The *Forbes* ranking of America’s Top RIA Firms, developed by SHOOK Research, is based on an algorithm of qualitative criteria – mostly gained through telephone, virtual and in-person due diligence interviews – and quantitative data. The algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience, leadership and senior principals, and other factors that encompass best practices and a firm’s approach to working with clients. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither *Forbes* nor SHOOK receive a fee in exchange for rankings.

To see *Forbes*’ full list of America’s Top RIA Firms, [please click here](#). To see the full ranking methodology, [please click here](#).

BLUE CHIP PARTNERS LAUNCHES NEW PODCAST AND INVESTMENT REVIEW SERIES

As part of Blue Chip's mission to educate clients, consumers, and investors, the firm recently launched two new educational content series. The first is the [Blue Chip NOW! podcast](#), a weekly market analysis podcast hosted by Seder, Director of Investments [Daniel Dusina, CFA](#), and Partner and Senior Financial Advisor [Matt Mondoux, CFA, CMT, CFP®](#).

Launched in late July 2023, there are now 19 informational episodes available. Throughout the various episodes, the trio shares their industry knowledge and insights to help make sense of what's going on in the markets, as well as look ahead to what's on the horizon so investors can be better prepared. They also cover a variety of investment management, retirement planning, and executive compensation topics to help ensure people are getting the most life out of their wealth.

In addition, Blue Chip recently launched a series called [Behind the Scenes: Investment Reviews](#), where the Investment Committee at the firm, led by Dusina, pulls back the curtain on the review process at Blue Chip Partners, providing the full Investment Review to investors in PDF form alongside a video breakdown and analysis. In the [first installment](#), Dusina looks at Texas Instruments Inc., KLA Corp., and ASML Holding NV, and in the [second installment](#), Dusina looks at Genuine Parts Co. and O'Reilly Automotive Inc.

To listen to the Blue Chip NOW! podcast, [please click here](#). To view the Investment Review series, [please click here](#).

BLUE CHIP PARTNERS VOLUNTEERING AND CHARITABLE INITIATIVES

As part of the firm's mission to give back to their community, Blue Chip Partners has made a recent effort to become more involved in volunteering and charitable activities. In mid-October, the firm made a donation to [Forgotten Harvest's Orchard of Hope](#) effort. In partnership with [Blake's Orchard & Cider Mill](#), the Forgotten Harvest Orchard of Hope consists of 500 apple trees on the grounds of Blake's Big Apple in Armada, Michigan. Blue Chip's gift will support the hundred-year lifespan of these trees, which provide roughly 50,000 pounds of fresh apples each fall to feed the community.

As a follow up to this donation, over 20 members of the Blue Chip team [volunteered at the Forgotten Harvest warehouse](#) in late October, where they packed bags of dark chocolate caramels for donation, broke down boxes, and helped to clean up the warehouse. Across the two shifts, Blue Chip team members helped to bag over 7,400 pounds of chocolate for inclusion in food boxes for families in need.

“Contributing to the community is something many of our team members do outside of work,” said Chief Operating Officer, [Erin Goss, CFA, CAIA, CIMA®, CFS®](#). “To foster a positive workplace culture for our team, we wanted to step up our efforts as a firm to continue to support this passion to help serve others.”

In addition, Blue Chip founder and CEO Robert Steinberg, along with his wife Cynthia, were proud to participate in a [Leadership Commitment](#) with Michigan State University's Spartan Fund, donating a brand new, branded sprinter van to the MSU Women's Golf team.

“As an alumnus of MSU and a lifetime golfer, I was more than happy to have the opportunity to give back to my alma mater and this fantastic program,” said Steinberg.

To continue the momentum, the firm recently created a Community Engagement Committee to foster recurring charitable and volunteer efforts by the firm, which will be chaired by Financial Advisor [Emily Prater, CPA, CFP®](#).

BLUE CHIP PARTNERS ADDS NEW PROFESSIONAL TO TEAM

The firm also recently announced the hiring of [Amy McLeod](#) as Executive Assistant, who will assist Steinberg, Seder, and other members of the executive team in any capacity necessary – from client services to operations and marketing and more.

McLeod graduated from the University of Michigan School of Engineering and spent the first five years of her professional career working at Electronic Data Systems (EDS) as a systems engineer. She then went on to work for six years at Primerica Financial Services as a Regional Leader. After starting her family, she wanted to be more closely involved with her children's education and spent the last 9 years as the middle school administrative assistant at Notre Dame Preparatory School, where she served as the primary person supporting the principal.

To learn more about McLeod and the rest of the team at Blue Chip Partners, [please visit the firm's team page](#).

ABOUT BLUE CHIP PARTNERS

Blue Chip Partners, LLC (Blue Chip) is a privately-owned, independent Registered Investment Advisory (RIA) firm headquartered in Farmington Hills, Michigan (a suburban area near Detroit). Blue Chip provides personalized wealth management and asset management services, serving as a fiduciary to over 800 client relationships with over \$1.2 Billion in assets under management. The advisors at Blue Chip have extensive experience and credentials that provide the foundation for providing comprehensive wealth management and holistic advice to a select clientele. Blue Chip has eight CERTIFIED FINANCIAL PLANNER™ licensees (CFPs), four Chartered Financial Analysts (CFAs), three Certified Public Accountants (CPAs), three Chartered Market Technicians (CMTs), and two licensed attorneys (Michigan). To learn more, visit www.BlueChipPartners.com.

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