NEWS
For Immediate Release

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Three Senior Team Members Named Partners at Fidato Wealth

In addition, CFP® Tony D'Amico to teach proven retirement planning strategies to participants in northeast Ohio

MIDDLEBURG HEIGHTS, OH (February 7, 2023) – Rewarding key contributors via strategies like profit sharing and providing long-term incentives is crucial as a company grows. To augment their dedicated support of the next generation of leaders, Fidato Wealth, an independently owned and operated fiduciary financial advisory firm located in Middleburg Heights, Ohio, announced that effective January 1st, 2023, three senior team members – Brian Eberhardt, Lindsay Fiore, and Marissa Beyer – have become Partners in the firm. All three have purchased equity in Fidato Wealth and are now officially owners in the company.

In addition, Fidato Wealth offers incentives, profit sharing, and other opportunities to all their employees in order to bolster morale and to promote alignment with their goals of exceeding client expectations, retaining current clients, and welcoming new clients.

"These three key contributors who are now Partners have significantly impacted our firm's ability to deliver the highest level of wealth planning and investment management services to clients," said Tony D'Amico, CFP®, Founder and CEO of Fidato Wealth. "I am proud that we offer opportunities and incentives to every single one of our employees. Everyone on the team makes a huge difference, which is why all positions at Fidato have compensation to reward contributions and align the team with our mission."

EBERHARDT, FIORE, AND BEYER PURCHASE EQUITY IN FIDATO WEALTH

Brian Eberhardt serves as Lead Wealth Advisor at Fidato Wealth and leads client relationships and wealth planning to help the firm and clients achieve their goals. He also guides the development and training of the firm's newer advisors. Eberhardt was born and raised in Northeast Ohio and graduated from Cleveland State University with a bachelor's degree in Finance. He also served in the United States Army for eight years before starting his career in the financial services industry. Prior to joining Fidato Wealth in 2015, he worked at PNC Capital Advisors and Apprisen Financial.

Lindsay Fiore serves as Operations Manager at Fidato Wealth and oversees Operations, all processes across the company, and compliance administration. She ensures that operations and client service both exceed the expectations of clients and is crucial in helping the firm achieve its long-term mission. Fiore joined Fidato Wealth in February of 2018 as a Client Service Specialist and worked her way up through the ranks to her current position. Prior to her time at Fidato Wealth, she attended Ohio University before serving as General Manager of a family-owned business.

Marissa Beyer CFP® serves as Senior Wealth Advisor and leads client relationships and their wealth planning to help them achieve their goals. Additionally, Beyer manages and leads the firm's newer advisors and manages the firm's wealth planning workflows. Marissa is a CERTIFIED FINANCIAL PLANNER™ Professional with over 15 years of advisory experience in retirement planning and wealth management. Prior to joining Fidato Wealth in 2020, she previously worked at True Wealth Design and RAV Financial Services after graduating from Edinboro University of Pennsylvania, where she received her B.S. in Financial Planning.

To learn more about all three team members, please click here.

FIDATO TO TEACH RETIREMENT PLANNING COURSE IN LOCAL COMMUNITIES

In addition, Fidato Wealth announced the next round of their interactive, continuing education course titled Retirement Planning Today®, which will be taught by Tony D'Amico, CFP®, Founder and CEO of Fidato Wealth. The course will be taught over two nights, with online and in-person sessions offered throughout February by Highland Community Education and Lorain County Community College as part of a larger financial literacy project.

OBJECTIVE EDUCATION FOR A COMPREHENSIVE RETIREMENT PLAN

Tuition is $49 and includes a 200+ page digital book with examples and illustrations. All fees collected are forwarded to Highland Community Education and the LCCC Lorain Learning Center. During this educational course, all examples will be noncommercial, and no specific financial products will be discussed or sold. Once students register, the firm will be notified, and they will provide details on how to log in to the class online or how to attend in person.

IN-PERSON CLASS

Via Highland Community Education at Highland High School
4150 Ridge Road, Medina, OH 44256
Wednesday, Feb. 22 and Wednesday, March 1 from 6:30-9:30 pm ET
Please click here to register.

VIRTUAL OPTION

Via LCCC Lorain Learning Center at Lorain County Community College
Wednesday, Feb. 8 and Wednesday, Feb. 15 from 6:00-8:30 pm ET
Please click here to register.

This course has been designed for those ages 50 and over who wish to educate themselves about planning for a successful retirement. The material presented will:

- Help participants determine if they are on track to accomplish their retirement goal
- Provide comprehensive, objective knowledge they can easily apply to their situation
- Provide information on estate planning strategies, healthcare, Medicare and long-term care considerations, social security and pension claiming strategies, how to determine the savings they will need to retire today or in the future, and much more

To learn more and register, please click here.

ABOUT FIDATO WEALTH

Fidato Wealth is a financial advisory firm headquartered in Middleburg Heights, OH, that provides retirement planning, family wealth management, and business advisory services. As an SEC Registered Investment Advisor, the firm is legally bound to act as a fiduciary, which means that the clients' needs always come first. Tony D'Amico, CFP®, Founder and Managing Partner, has been quoted in *The Wall Street Journal, CNBC, Barron's* and other national publications. Fidato Wealth has been named to *Financial Advisor* magazine's Top RIA Rankings every year since 2017. For more information, visit www.FidatoWealth.com.

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