

NEWS

For Immediate Release

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Executives at Blue Chip Partners Named to Forbes' 2023 List of Best-In-State Wealth Advisors

*Plus: Director of Portfolio Operations joins the team and new
CFP® credentials added to team accomplishments*

FARMINGTON HILLS, MI (May 25, 2023) – [Blue Chip Partners \(“Blue Chip”\)](#), an award-winning, independent Registered Investment Advisor and comprehensive wealth management firm located just outside of Detroit, recently had two executives named to [Forbes’ 2023 list of Best-In-State Wealth Advisors](#). In the 2023 rankings, CEO [Robert Steinberg, JD, CPA, CFP®](#) and Managing Partner [Dan Seder, CFA®, CMT, CFP®](#) were both listed, ranking #17 and #18 respectively in the state of Michigan.

“Dan and I are both very proud to be named top wealth advisors in Michigan by *Forbes*,” said Robert Steinberg, Founder and CEO of Blue Chip Partners. “However, we couldn’t have earned this honor without all of our amazing team members who work so hard to serve our clients and make Blue Chip an award-winning firm.”

Forbes’ rankings, developed by SHOOK Research, are one of the only advisor rankings with a focus on quality, including surveying and interviewing advisors in-person and virtually. Rankings are based on an algorithm of qualitative data collected through these surveys and interviews to evaluate best practices, level of service, investing models, and compliance records, as well as quantitative data such as revenue produced and assets under management.

SHOOK Research prides itself on recognizing the most outstanding financial advisors in the business and creating rankings of role models – advisors that are leading the way in offering best practices and providing a high-quality experience for clients. Unlike other advisor rankings, SHOOK is not a “robo-ranker” and is completely independent and objective – they do not receive compensation from financial advisors, their firms, or the media in exchange for rankings. They believe that production and asset numbers don’t tell the whole story and that a focus on both qualitative and quantitative factors is imperative.

To see the full list of *Forbes*' 2023 Best-In-State Wealth Advisors rankings, [click here](#).

BLUE CHIP ADDS NEW DIRECTOR OF PORTFOLIO OPERATIONS TO TEAM

This Spring, Blue Chip Partners welcomed a new Director of Portfolio Operations to their team: [Andrea Cloutier](#). As Director of Portfolio Operations, Cloutier has oversight of and significant responsibilities within Blue Chip's portfolio accounting, trading, and reporting systems used to manage client relationships. She is an analytical, tech-savvy, process-oriented personality and the firm will be looking to her to improve firm efficiency and enhance the consistency of the client experience.

Prior to joining Blue Chip in 2023, Cloutier spent over six years at Plante Moran Financial Advisors, one of the nation's largest Registered Investment Advisors, where she worked as a Senior Data Operations Analyst. In addition to Plante Moran, Cloutier spent nine years at Comerica Bank where she worked in Trust Operations as a Fund Accounting Manager. She graduated from Central Michigan University with a B.A. in Business Administration, majoring in Finance.

FINANCIAL ADVISOR CODY VANDERHAGEN EARNS CFP® MARKS

In addition, Blue Chip announced that financial advisor [Cody VanderHagen, CFP®](#) has earned the CERTIFIED FINANCIAL PLANNER™ marks of distinction and can now use the CFP® marks after his name. With this accomplishment came a promotion for VanderHagen, who moved from Associate Advisor to Financial Advisor within the firm.

"We're so proud of Cody and the hard work he put in to achieve this success," said Erin Goss, Chief Operating Officer at Blue Chip Partners. "Since joining our firm in 2020, Cody has been an invaluable part of our team, and we're excited to witness his continued growth."

In addition to two Associate Financial Advisors, there are now nine Financial Advisors on staff. Eight of them are CERTIFIED FINANCIAL PLANNER™ professionals.

Click to learn more about [the Blue Chip team](#).

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 750 client relationships with over \$1.1 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.