



GRYPHON
FINANCIAL PARTNERS

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Jeffrey R. Lagusch, CFP® Earns Advanced Wealth Management Certification—Certified Private Wealth Advisor®

COLUMBUS, OH – January 2, 2024 – Jeffrey R. Lagusch, CFP®, CPWA®, Director of GFP Wealth Management at Gryphon Financial Partners recently earned the Certified Private Wealth Advisor® certification, which is an advanced professional certification for advisors who provide the breadth of specialized skills required to meet the needs of high-net-worth clients. Jeff has been an advisor for over 25 years and takes immense pride in his long-lasting client relationships.

To earn certification, CPWA professionals must meet a five-year experience requirement, successfully complete coursework in advanced wealth management strategies, and pass a comprehensive examination covering 11 core topics, including applied behavioral finance, charitable giving, estate planning, and wealth transfer. To maintain certification, CPWA professionals must meet ongoing continuing education requirements and adhere to the Institute's *Code of Professional Responsibility*. Investment & Wealth Institute (Institute) awards CPWA certification. Visit www.investmentsandwealth.org for more information.

About Gryphon Financial Partners:

Gryphon is a comprehensive wealth management firm headquartered in the Arena District in Columbus, Ohio with locations in Toledo and Cincinnati, Ohio. With over \$1.4 billion of assets under management, Gryphon safeguards and protects personal wealth, retirement assets, and business equity. They do this by offering a full range of services such as strategic asset allocation, private investment opportunities, risk management, wealth transfer strategies, philanthropic planning, lending strategies, and extensive financial planning.

Learn more at gryphonfp.com.
