TRINITY
WEALTH MANAGEMENT, LLC

Our Company

We are an *independent* Registered Investment Advisor. Our office is located in Kenwood, a suburb of Cincinnati, Ohio. We provide comprehensive wealth management on a *fee-only* basis to clients worldwide. *Fee-only* means we do not receive commissions or fees other than what is paid to us by our clients.

Our Mission

Our mission is to provide clients a disciplined, goal-based process to achieve their financial objectives.

Our Process

Our wealth management process helps clients identify realistic financial goals, establish a plan of action, implement the plan and track its progress. Our collaborative approach to managing wealth engages the client in the process to ensure a united, disciplined effort in achieving financial goals.

Our Advisors

Robert J. Wassel, CPA/MBA/PFS: Co-owner and Chief Investment Officer

J. Brock Dexter, CFP®: Co-owner and Chief Operating Officer

Charles N. Kuhn III: Investment Advisor Representative and President of Charles N. Kuhn and Associates, Inc., a non-affiliated financial services company.

With over 40 years combined experience in the financial services industry, our seasoned team possesses a wide variety of skills to guide our clients along the path to financial success. Our professional credentials not only indicate completion of a rigorous education, testing and vetting programs, but require on-going continuing education and adherence to a strict code of ethics. These credentials, along with membership in professional organizations, require that we adhere to a fiduciary standard of care when advising clients and provide a level of transparency in our operations above reproach.

In addition to his credentials as a licensed CPA and MBA, Bob Wassel is a member of the American Institute of CPA's and is designated a Personal Financial Specialist by that organization.

Brock Dexter is a Certified Financial Planner™ and a member of the Financial Planning Association (FPA®) and registered with the National Association of Personal Financial Advisors (NAPFA).

Our Commitment to You

We place the interest of our clients ahead of our own in everything we do. We pride ourselves on being readily and directly accessible to our clients. Client convenience and exemplary client service are our hallmarks. We sell nothing to our clients but our advice and fully disclose our fees up front. We utilize Charles Schwab & Co., Inc. as our independent investment custodian.