

Jonathan Dannemiller ChFC[®], CLU[®], AEP[®]

With nearly 20 years of experience, Jon has been working with financial planners and their clients using a consultative approach to implement risk management strategies based upon a goal-based planning approach. He has extensive experience with high net worth and ultra-high net worth clients in the areas of estate planning, business succession planning, disability and long-term care planning. A graduate of the University of Notre Dame, Jon also earned his MBA from the University of Cincinnati. Jon holds the Accredited Estate Planner designation from the National Association of Estate Planners and Councils. He also earned his Chartered Life Underwriter and Chartered Financial Consultant designations from the American College. Jon lives in the Cincinnati area with his three children. He is active in the Cincinnati Estate Planning Council, currently serving as Secretary/Treasurer, and the Batavia Township Zoning Board where he has been a board member for over 13 years. Jon also currently serves as Chair of Parish Council at St. Veronica Church.