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## **Chicago-Based Independent Wealth Management Expands its Footprint in Ohio with New Columbus Office**

### **Two Veteran Advisors with a Focus on Professional Athletes Join Keebeck Wealth Management**

#### ***Keebeck Wealth Management Client Assets Top \$1.4 Billion***

Chicago, IL ...June 23, 2020 -- Keebeck Wealth Management announced today the addition of two financial advisors Steve C. Vujevich and Matthew P. Anderson. Keebeck is opening a new Columbus, Ohio office as part of this expansion.

Keebeck Wealth Management is an independent wealth management firm based in Chicago and Columbus. The firm works with high net worth individuals and families to simplify their financial decision-making by educating them on how to control their capital. Keebeck Wealth Management is a member of the Dynasty Financial Partners Network and currently has \$1.4 billion AUM.

Mr. Vujevich and Mr. Anderson previously worked at Merrill Lynch in Columbus where they managed \$400 million in client assets.

- **Steve C. Vujevich**, Managing Director, President of KWM Advisory Division

As Managing Director and President of KWM Advisory Division, Mr. Vujevich works closely with professional athletes, entrepreneurs, corporate executives, and other individuals with complex financial situations, helping them discern the challenges and capitalize on the opportunities that can accompany significant wealth. Previously, he was a First Vice President and Private Wealth Manager at Merrill Lynch in Columbus, Ohio from 1999 to 2020. Mr. Vujevich works closely with professional athletes, entrepreneurs, corporate executives and other individuals with complex financial situations. Prior to joining Merrill Lynch, he worked as a sports agent and business manager. He earned his Bachelor's degree from Ohio State University in Columbus where he was a member of the Varsity Football team.

- **Matthew P. Anderson**, CPWA<sup>®</sup>, CFP<sup>®</sup>, MBA, Managing Director, Director of Wealth Planning

As Managing Director and Director of Wealth Planning at Keebeck Wealth Management, Mr. Anderson provides customized advice and guidance designed to assist clients in strategically navigating the complexities of their wealth. Previously, he was a Vice President and Private Wealth Relationship Manager at Merrill Lynch in Columbus. He is experienced in providing integrated wealth advisory services to professional athletes, C-suite corporate executives and high net worth clientele with distinctive needs and priorities. He began his career in 2002 at Merrill Lynch and is a CERTIFIED FINANCIAL PLANNER CFP<sup>®</sup> practitioner and a Certified Private Wealth Advisor CPWA<sup>®</sup> professional. He is a two-time graduate of Capital University, earning a B.A. in Business Administration and an MBA, both with concentrations in Finance.

“We are excited to join the independent movement and look forward to partnering with the team at Keebeck Wealth Management. We feel that, over the next 10 years, the RIA platform with true open architecture will be the best vehicle for to our clients to differentiate their portfolios and provide customized solutions,” said Mr. Vujevich. “The comprehensive platform provided by Keebeck Wealth and Dynasty Financial Partners will help us serve the ultra-high-net worth clients, professional athletes, CEOs, entrepreneurs and traditional and non-traditional families.”

As part of this announcement, Keebeck is opening a new office in Columbus, Ohio.

“We are proud to welcome Steve and Matthew to Keebeck Wealth Management. Steve and Matthew have a significant advisory practice with deep connections to their clients and the community,” said Keebeck Wealth Management Founder and CEO Bruce K. Lee. “Clients are demanding greater transparency and choice. It's why the independent space is growing and large teams are gravitating to the open platforms.”

### **About Keebeck Wealth Management**

Keebeck Wealth Management is an independent wealth management firm based in Chicago, Columbus... The firm works with high net worth individuals and families to simplify their financial decision-making by educating them on how to control their capital, by helping them to identify the best path to their true goals, and by creating a focused plan to “step forward.”

To serve the constantly evolving needs of our clients, at Keebeck, the professionals remain flexible and nimble, committed to optionality and speed, focused on intellectual capital and technology, and always seeking to simplify the complex.

Keebeck combines an open platform, digital solutions, and the client-centric focus of the fiduciary standard to empower their wealth management clients to "step forward" in every aspect of their lives.

For more information, please visit [www.keebeck.com](http://www.keebeck.com).

