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**Danielle R. Seurkamp, MS, MPAS®, FBS®, CFP®**

Prior to joining TAAG in 2014, Danielle worked as a fee-only Financial Planner for Foster & Motley, Inc. During her time at Foster & Motley, she developed comprehensive planning solutions for high net worth individuals and families that included analysis and advice on areas such as cash flow, taxes, college and retirement preparation, investments, risk management, estate planning and charitable giving. She also assisted clients with their individual tax return preparation and with accounting and tax return preparation for trusts.

**Date of birth**

August 8, 1983

**Education**

M.S. Personal Financial Planning, College for Financial Planning, 2015  
B.A., Xavier University, 2005

**Business Experience**

Lead Advisor, The Asset Advisory Group, Inc. (12/2014 – Present)  
Lead Financial Planner, Foster & Motley, Inc. (10/2010 - 12/2014)  
Tax Preparer, Foster & Motley, Inc. (01/2008 – 12/2014)  
Associate Financial Planner, Foster & Motley, Inc. (05/2008 – 10/2010)  
Administrative Assistant, Foster & Motley, Inc. (03/2006 – 05/2008)

**Professional Designations**

CFP® - CERTIFIED FINANCIAL PLANNER™  
MPAS® - Master Planner Advanced Studies  
FBS® - Certified Financial Behavioral Specialist

**Disciplinary Information**

Ms. Seurkamp does not have any history of reportable disciplinary events.

**Other Business Activities**

Ms. Seurkamp is not engaged in any other investment-related business or occupation.

**Additional Compensation**

Ms. Seurkamp does not receive any compensation for her work other than her salary from TAAG.

**Supervision**

As Chief Compliance Officer, Jeannette Jones is primarily responsible for supervision of our employees' advisory activities, and the advice they provide to our clients. We have written policies and procedures, which include the use of investment policy statements signed by both the client and the advisor, restrictions on employee personal trading, and prohibitions against trading based on material non-public information. Jeannette regularly monitors these and other elements of the firm's policies and procedures to assure compliance.

Jeannette Jones can be contacted at (513) 771-7222 or at [jjones@taaginc.com](mailto:jjones@taaginc.com).

**Requirements for State-Registered Advisors**

Since TAAG is registered with the SEC, there are no additional disclosures.