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## **Jeannette A. Jones**

Jeannette A. Jones, CPA, CFP® is the founder of The Asset Advisory Group, and has spent over 25 years serving clients as a financial advisor. Prior to establishing the company in 1988, Jeannette gained business and tax experience as both a commercial lending officer and an auditor with an international accounting firm.

### **Date of birth**

December 13, 1959

### **Education**

BSBA in Accounting and Finance, The Ohio State University (1982)

### **Business Experience**

Founder, Owner, and Lead Advisor, The Asset Advisory Group, Inc. (1988 – Present)  
President, The Asset Advisory Group, Inc. (1988 – 2015)  
Commercial Banking Officer, KeyBank (1985 – 1988)  
Supervising Senior Auditor, KPMG (1982 – 1985)

### **Professional Designations**

CFP® (Certified Financial Planner)  
CPA (Certified Public Accountant)

### **Disciplinary Information**

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

### **Other Business Activities**

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

### **Additional Compensation**

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

### **Supervision**

Jeannette Jones is the Chief Compliance Officer. While Ms. Jones has ultimate decision-making authority, TAAG has two other Advisors who act as portfolio managers and other personnel who regularly meet and discuss each other's activities as they relate to advice provided to advisory clients, including transactions effected for client accounts. The portfolio managers, including Ms. Jones, review accounts on an ongoing basis to monitor the disciplined and consistent implementation of their investment decisions. TAAG conducts account reviews on an ongoing basis to assure adherence to clients' stated investment objectives, investment restrictions, and limitations. This includes accounts managed by Ms. Jones.

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