MEDIA AND SPEAKING

Anthony Ruiz

CFP®, CPWA®, MBA

Founder and Principal Wealth Strategist

Anthony Ruiz is the founder and principal wealth strategist of Ruiz Financial Group, an independent, fee-only financial planning and investment management firm based in Toledo, Ohio. With nearly two decades in financial services, Anthony has worked across retail banking, institutional investing, and private banking.

He provides financial planning and investment guidance to healthcare professionals, business owners, and people approaching or living in retirement. His approach was also shaped by his experience surviving stage 3 colorectal cancer, which reinforced the difference between receiving generic information and having a plan built around the individual.

CREDENTIALS AND AFFILIATION

CERTIFIED FINANCIAL PLANNER™

CPWA® | MBA | NAPFA Member

Media contact

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INTERVIEW AND SPEAKING TOPICS

Clear conversations about complex financial lives

Anthony is available for interviews, podcasts, panels, presentations, and professional education conversations.

Financial Planning for Healthcare Professionals

Taxes, limited time, career transitions, practice decisions, retirement plans, and the challenge of coordinating a demanding financial life.

Retirement Planning and Income Decisions

Turning accumulated savings into a coordinated approach to income, investments, taxes, healthcare, and legacy decisions.

Business Owners and the Personal-Business Connection

How business value, cash flow, retirement plans, taxes, succession, and personal priorities affect one another.

Tax-Aware Financial Planning

Why tax decisions should be considered alongside retirement, investing, charitable giving, and estate planning.

The Difference Between Information and a Personal Plan

Lessons from Anthony's cancer experience about clarity, individual guidance, contingency planning, and the value of knowing what comes next.

Fee-Only Financial Advice and Fiduciary Relationships

How compensation structure, conflicts, transparency, and coordinated planning shape the client experience.

ABOUT RUIZ FINANCIAL GROUP

Independent financial guidance built around the individual

Ruiz Financial Group is an independent, fee-only financial planning and investment management firm based in Toledo, Ohio. The firm serves healthcare professionals, business owners, and people approaching or living in retirement through comprehensive planning and investment guidance designed to connect the decisions across their financial lives.

FIRM AT A GLANCE

Structure	Independent, fee-only registered investment adviser
Services	Comprehensive financial planning and investment management
Primary audiences	Healthcare professionals, business owners, and retirees
Location	Toledo, Ohio, serving Northwest Ohio and Southeast Michigan

MEDIA INQUIRIES

Share your topic, audience, and deadline

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