Simon T. Buchman, CFP®

Portfolio Manager
Wealth Advisory Services, Cincinnati

Simon joined Johnson Investment Counsel in 2013. He is a Portfolio Manager and holds the Certified Financial Planner (CFP®) designation. Before coming to the firm, he worked at Fidelity Investments.

> 513.661.3100

Team Member(s):

Sandy F. Appel, CFP®
Associate Portfolio Manager

Lisa S. Harms
Client Support Assistant

Relevant Work Experience:

Fidelity Investments

Education:

Xavier University, M.B.A., Finance
University of Toledo, B.B.A. Finance

Community Involvement:

LaSalle High School,
Advancement Advisory Board
LaSallian Scholars Program
Pro Seniors,
Board of Trustees
Finance Committee

My Story:

Simon Buchman's boyhood home was just around the corner from the Johnson Investment Counsel headquarters. It was also the base of operations for his parent's mom-and-pop enterprise.

Simon and his three brothers grew up working for their mom and dad in the vending business. On many summer days while his grade school pals were playing outdoors or at the pool, he was working with his dad earning his own money.

"I got to see at an early age what it means to run a business -- going to the warehouse, taking the delivery, putting the order on the truck, stocking the machines, collecting the money, putting the money in the bank."

"It gave me an appreciation for hard work and the value of a dollar as a kid. I knew money didn't just come from Mom or Dad's pocket. I saw the work that went into generating each dollar. I keep that in mind with my clients today, that we're being entrusted with their years of hard work and savings."

While in college, Simon participated in a cross-country bicycling trip called "Journey of Hope." Its goal was to draw attention to and raise funds for a range of non-profits supporting people with various disabilities. He raised $5,000 to join the team and pedaled some 4,000 miles from San Francisco to Washington, D.C., in 63 days. After riding an average of 75 miles per day in the mornings, the team spent afternoons and evenings visiting with some of the local groups "Journey of Hope" was benefitting.

"It was a once-in-a-lifetime experience. The physical aspect of riding across the country was anything but easy, although it was an amazing way to see America. But the lasting impact came at the end of the ride each day. I met such positive people – people focused not on what they couldn't do but on what they could."

"It helped me think deeply about all the blessings I have and, to this day, drives me to make the most of them."

Simon and his wife, Megan, a first grade teacher at Terrace Park Elementary, have a daughter named Lucy. He says they are his main source of inspiration and thinks of his family as a team. He says the best thing he can do for Lucy is to love Megan so that their child might form the proper expectations for how she should be treated.

He will tell you that a key component to succeeding in his work is empathy.

"It's imperative to put myself in my client's shoes and think about what I would want if I were that person. What would I care about? What would matter to me?"

“Wealth is so personal. It’s truly rewarding to help families identify what wealth means to them and work together to develop a plan to grow, use, protect and distribute their wealth. The ability to do that at a firm that values integrity and puts the client first is a gift.”