

MICHAEL GHEEN, CPA/PFS, CRPS®

Vice President | Senior Client Executive | Retirement Plan Services

📞 216.452.5940

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ABOUT ME

A dedicated leader with experience and education as a CPA/PFS (Certified Public Accountant/Personal Financial Specialist) who helps businesses and individuals with guidance and results-driven strategies that focus on due diligence, plan design, benchmarking, financial wellness, and high-quality service and communication.

LIFE PHILOSOPHY

TAKE A CHANCE AND DON'T BE AFRAID TO TRY SOMETHING NEW. TRYING AND FAILING HELPS YOU GROW. NO GROWTH COMES FROM SIMPLY NOT TRYING.

PROFESSIONAL STRENGTHS

🚀 Challenging the Status Quo

📁 Work Ethic

⚙️ Diverse Technical Knowledge

📈 Strategic Forward Thinker

🔧 Problem Solving

PERSONAL STRENGTHS

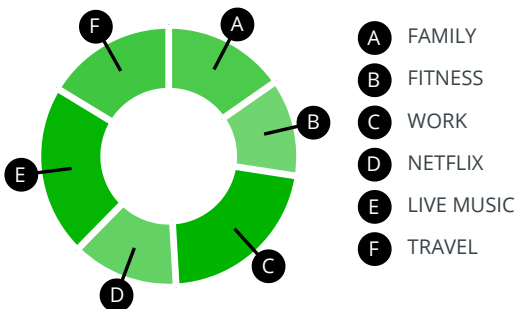
🤝 Trustworthy

👍 Dependable

🔗 Loyal

🧠 Open Minded

WEEK IN THE LIFE



EXPERIENCE

Senior Client Executive (Retirement Plan Services)

Oswald Financial, Inc.

📅 08/2015 - Ongoing

Vice President - Retirement Plan Sales Consultant

Huntington National Bank

📅 10/2013 - 07/2015

EDUCATION

Bachelor of Business Administration, Accounting
Ohio University

PROUD OF

🏆 **MY CHILDREN**

I'm proud to have helped raise three great children ages 17, 20 and 24 to become successful young adults

🤝 **HELPING MY CLIENTS**

I'm honored to have spent 25 years helping people from all walks of life retire timely with dignity