

Jason A. Eliason, CFP[®], ChFC[®], CFA[®]

Partner



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Jason's primary responsibilities include client service, advanced planning, and investment research. Jason serves as the Chief Investment Officer and chairs the investment committee.

Jason and his wife, Ruth, grew up in the small town of Mesopotamia in Northeastern Ohio. Jason and Ruth both graduated from Ohio Wesleyan University in 1999 and married in 2001. They had their first child, Jacob, in 2006 followed by their daughter, Isabella, in 2010, and their third child, Nicholas, in May 2015. Jason and Ruth enjoy spending their time outdoors maintaining their homestead in rural Delaware. They also enjoy traveling, gardening, and hiking.

Jason won the 2016 Columbus Business First *Forty Under 40* award for his hard work at Waller Financial, and his contributions to the community.



Education & Designations

- Ohio Wesleyan University
- Bachelor of Arts
Major in Economics
- Graduated with honors,
Cum Laude
- CERTIFIED FINANCIAL
PLANNER[™] Professional
- Chartered Financial Consultant[®]
- Chartered Financial Analyst[®]



Professional Memberships

- Charitable Gift Planners of
Central Ohio, *Board Member &
Past President*
- Financial Planning Association
of Central Ohio, *Past Director*
- National Association of Charitable
Gift Planners
- CFA Society of Columbus



Community Connections

- Stratford Ecological Center
*Board Member &
Past President*

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