Brookside Tax & Financial Group

Your One-Stop Advisors℠

"Retirement planning is a lot like solving a jigsaw puzzle," says Christopher Anselmo, President of Brookside Tax and Financial Group, and Anselmo & Company, LLC. Together, these companies assist clients with the four largest pieces of retirement planning: Financial, Legal, Tax and Insurance. Whereas most people understand the importance of financial management, Chris finds that many do not understand the necessity of elder/estate planning. "Clients typically come for taxes, but we always take time to educate them on the importance of future planning and investing."

From his early beginnings working for his father in the family's West Side Market produce business, Chris was taught to "treat people as Clients, not Customers... they will feel the difference." This is something that has stuck with him through the years as he worked to build a firm that provided that personal touch.

Chris and his team start by helping clients establish short-term and long-term goals, providing innovative strategies and solutions that help their overall financial health and security. One of the biggest problems he says they face is procrastination, especially on the elder care side. "Few people are aware of the nursing home costs that they will face. According to Genworth.com, the average annual cost of a room is $106,763; many people end up losing their homes just to cover their portion of the cost."

Christopher Anselmo

Sharing these insights has helped Chris and his team establish trust and build lifelong relationships. "Our hardworking clients are the ones who keep our community running. Their free time shouldn't be spent worrying about finances and future retirement plans. It's our job to focus on helping them navigate potential future disasters. We focus on our job, so they can focus on theirs."

It's clear that Chris is big on community. He throws client appreciation events throughout the year, including clambakes and baseball games. Many of his events include fundraising for his charity, Brookside Gives Back, which helps those in need of assistance for k-12 education, mortgage and rent payments. Over the last several years, they've raised almost $100k.

Christopher's passion for helping people with finances has led to him being honored with Crain's Cleveland Notable Wealth Manager (2021) and Notables in Finance (2022). "I love helping clients prevent future problems that they didn't even know were possible. There is nothing better than protecting that which matters most, and helping the people who help our community." As a community leader and educator, Chris hosts a popular podcast called Road to Retirement, where he shares his personal insights and guidance. He has also authored six books, including his most recent book: *Medicaid Secrets: How to Protect Your Family's Assets from Devastating Nursing Home Costs*.

For over three decades, Chris has been dedicated to educating and serving clients to design and maintain plans that will help them to transfer a legacy of true wealth to their families. Chris and his team are the One-Stop Advisors℠ that their clients turn to for their tax, financial, insurance, investment, retirement, and estate planning needs.

Brookside
TAX & FINANCIAL GROUP

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