



Thomas A. Steele, CPA

Chief Financial Officer, Vice President, Principal



Thomas A. Steele, CPA, is Chief Financial Officer at Bartlett Wealth Management. He also serves as Vice President, Secretary/Treasurer and a Principal at the firm. Tom's responsibilities at Bartlett include overseeing finances, operations, mergers & acquisitions, technology, and compliance functions.

Tom is passionate about business strategy and uses his knowledge to help guide the firm toward goals set by its management team. He led Bartlett's recent mergers and acquisitions, including selling a majority stake in the firm to Focus Financial Partners, as well as Bartlett's acquisition of Lodestar Investment Counsel in 2019.

Tom has always viewed volunteering and service to the community as important. He is a past President of the Board of Royalmont Academy, and served on the board of Catholic Charities Southwestern Ohio, Catholic Inner-City Schools and Seven Hills Neighborhood Houses. In 1988, he was named as one of Greater Cincinnati's "Forty Under 40" business leaders.

Tom joined Bartlett in January 1988. Prior to this, he was a senior tax accountant at Price Waterhouse. He has 38 years of experience.

Areas of Expertise

Taxes

Strategic planning

Financial analysis

Mergers and acquisitions

Interview and Media Experience

[Bartlett expanding with deal to acquire Chicago investment advisory firm](#), Cincinnati Business Courier

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