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2024 AUG 2 10:10

STATE OF OHIO  
**Executive Department**

OFFICE OF THE GOVERNOR

*Columbus*

I, Mike DeWine, Governor of the State of Ohio, do hereby appoint Shon P. Anderson, from Sugarcreek Twp, Greene County, Ohio, as a Member of the Central State University Board of Trustees for a term beginning August 2, 2024 and ending at the close of business June 30, 2032, replacing Sherri Richardson, whose term expired.



IN WITNESS WHEREOF, I have hereunto subscribed my name and caused the Great Seal of the State of Ohio to be affixed, at Columbus, this 2nd day of August in the year of our Lord, Two Thousand and Twenty Four.

*Mike DeWine*

Mike DeWine  
Governor

## Contact

[www.linkedin.com/in/shonanderson](http://www.linkedin.com/in/shonanderson)

(LinkedIn)

[www.AndersonFinancialStrategies.com](http://www.AndersonFinancialStrategies.com)

(Company)

## Top Skills

Portfolio Management

Investments

Strategic Financial Planning

## Certifications

CERTIFIED FINANCIAL  
PLANNER™ Professional

CFA | Chartered Financial Analyst

# Shon P.

## Anderson, MBA, CFP®, CFA®

President & Chief Wealth Strategist @ Anderson Financial Strategies  
| Adjunct Professor - Estate Planning | President @ CFA Society  
Dayton | Forbes Finance Council Member

## Summary

As President & Chief Wealth Strategist, Shon delivers premium expertise to clients in order to serve their financial strategy needs. His insights have been quoted in leading financial news publications such as CNBC, Yahoo Finance, Fox Business, Consumer Reports, Forbes, Bankrate.com, Investment News & Kiplingers.

Shon began his financial career in 2003. He is a two time graduate of Wright State University earning both a Bachelors degree majoring in financial services as well as an M.B.A. degree concentrated in finance. In addition, Shon has earned the distinguished designations of CERTIFIED FINANCIAL PLANNER (CFP) and Chartered Financial Analyst (CFA). Further professional endeavors include serving as an adjunct professor teaching personal finance courses at Wright State University, leading CFP Exam review courses for Keir Educational Resources, and is currently serving as president of the Dayton CFA Society.

Professional Designations:

CERTIFIED FINANCIAL PLANNER (CFP)

Chartered Financial Analyst (CFA)

To learn more about Shon and Anderson Financial Strategies, please visit <https://www.andersonfinancialstrategies.com/>

Anderson Financial Strategies, LLC is a registered investment adviser located in Dayton, Ohio. Anderson Financial Strategies, LLC may only transact business in those states in which it is registered, or qualifies for an exemption or exclusion from registration requirements. Any subsequent, direct communication by Anderson Financial Strategies, LLC with a prospective client

shall be conducted by a representative that is either registered or qualifies for an exemption or exclusion from registration in the state where the prospective client resides. For information pertaining to the registration status of Anderson Financial Strategies, LLC, please contact the state securities regulators for those states in which Anderson Financial Strategies, LLC maintains a registration filing. A copy of Anderson Financial Strategies, LLC's current written disclosure statement discussing Anderson Financial Strategies, LLC's business operations, services, and fees is available at the SEC's investment adviser public information website – [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) or from Anderson Financial Strategies, LLC upon written request.

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## Experience

Anderson Financial Strategies, LLC  
President & Chief Wealth Strategist  
October 2012 - Present (11 years 9 months)

Financial Strategy is Complicated. We'll Get You Organized & Focused.  
At Anderson Financial Strategies, our mission is to provide our clients with quality financial expertise along with rapidly responsive service through an honest relationship.

We honor our fiduciary duty above all, and practice full disclosure, due-diligence, and regular communication. As a client, you will be plugged into an "ecosystem" of financial advice that is designed to deliver confidence about your financial strategy.

Advisory services offered through ANDERSON FINANCIAL STRATEGIES, LLC.

Wright State University  
Adjunct Professor  
January 2009 - Present (15 years 6 months)  
Current courses taught: Finance 2050 - Personal Financial Decision Making

This course provides the student with a detailed overview of personal financial planning concepts that every individual typically encounters throughout their lifetime. By establishing sound financial literacy, students can more effectively

analyze and navigate major and minor financial decisions that may arise. Concepts include, personal financial statements, Time Value of Money, Investments, Liability Management, Retirement Planning, Tax Planning, Estate Planning, Insurance, Real Estate decisions, etc.

#### Keir Educational Resources

CFP Exam Review Instructor

February 2016 - March 2020 (4 years 2 months)

As an instructor for a 4 day live review course, I provide examination tips to help prepare financial professionals to pass the rigorous CFP® Certification Examination, This includes a thorough review of the eight-core subject areas (Professional Conduct and Regulation, General Principles of Financial Planning, Education Planning, Risk Management and Insurance Planning, Investment Planning, Tax Planning, Retirement Savings and Income Planning, and Estate Planning), focusing on key areas within the 72 topics tested on the CFP® Certification Examination.

#### Merrill Lynch Wealth Management

Financial Advisor

September 2007 - October 2012 (5 years 2 months)

#### UBS Wealth Management

Planning Associate

June 2003 - September 2007 (4 years 4 months)

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### Education

Wright State University

M.B.A., Finance · (2006 - 2007)

Wright State University

Bachelors, Financial Services · (2001 - 2006)



**Ohio Senate**  
Senate Building  
Room 34, Ground Floor  
Columbus, Ohio 43215  
(614) 644-7718  
[Cirino@ohiosenate.gov](mailto:Cirino@ohiosenate.gov)

**Committees:**  
Workforce and Higher Education – Chair  
Finance – Vice Chair  
Energy and Public Utilities  
Ways and Means

**Jerry C. Cirino**  
18th District

Dear Newly Appointed Trustee,

I would like to be one of the first to congratulate you on your recent appointment as trustee to one of Ohio's public universities or community colleges. Service as a trustee is of utmost importance to the students and citizens of Ohio who save and pay for higher education in our state. Your work as a trustee ensures that students receive an education that will lead to future employment and success, both of which are important pieces to the economic health of our state. As a trustee, you have the authority and responsibility to safeguard students' wellbeing and the duty to protect their constitutional freedoms. You are also a steward of upholding Ohio's historical commitment to higher education.

I am writing today to provide information on the appointment process going forward. The Ohio Senate, as provided in Article III, Section 21 of the Ohio Constitution, has advice-and-consent authority regarding gubernatorial appointments. Your appointment will be assigned a confirmation hearing in the Senate Workforce and Higher Education Committee ("Committee"). As part of this process, you are asked to complete the attached questionnaire. You may also be asked to meet with Committee members or attend a hearing.

With respect to the questionnaire, I ask that you thoughtfully answer each question and submit your responses to my office within 30 days of receipt so that your confirmation may proceed and your appointment completed. A confirmation hearing will not be scheduled until a completed questionnaire has been submitted. Once my office receives this information, we will work diligently to schedule your appointment on the Committee's agenda. If you have any questions about this process or would like an update on the status of your appointment, please contact my office at 614-644-7718.

Sincerely,

Jerry C. Cirino  
State Senator, District 18  
Chair, Workforce and Higher Education Committee

Ohio Senate Advice and Consent  
Trustee Appointment Questionnaire

Name: Shon P. Anderson

Institution Being Appointed to:

Central State University

1. Are you a graduate of or do any of your dependents attend the institution to which you are being appointed as trustee?

No

2. What is your position on the First Amendment rights of faculty, staff, and students, and how will you balance this with promoting diversity of thought on campus?

First Amendment rights should certainly be protected at Universities, but only to the extent that it does not disrupt the environment for other students and faculty. Likewise, Universities should not take positions or promote policies that are one sided. Furthermore, there should be a concerted effort to balance hosted speakers and foster an environment that does not lead to faculty experiencing real or perceived retribution.

3. In your opinion, what are three current significant issues affecting higher education?

1. Lower enrollment
2. Cost Containmentment
3. Too much Social Engagement

4. Do you feel comfortable presenting new or alternative solutions to issues presented to the Board of Trustees ("Board") by the president or other trustees of the institution to which you are being appointed?

Of course. Board members should be actively engaged in seeking ways to best serve the University.

5. What are some ideas you plan to propose to reduce the overall cost of higher education?

The cost issue, in a broader context, has been massively exacerbated by the Federal Governments excessive funding of student loans. When students and/or families don't have actual "buy in" to the investment that is education, they are more likely to overpay with "other peoples money" in the short run. This also leads to complaints when paying the loans back. An idea would be to treat loans similar to mortgages, where there is a required cost share component.

6. What thoughts do you have on faculty tenure, post-tenure review, and annual faculty performance reviews?

Tenure is a terrible idea in my view, as it disincentivizes performance after obtaining it. The process for obtaining it is also sub-optimal as it rewards research more than teaching from my understanding. However, as an ingrained benefit to the world of Higher Education, it would be hard to eliminate when competing to bring on top talent.

7. What are your thoughts on ways to increase graduation rates at the institution to which you have been appointed?

Student guidance on career fields for their respective major is critical along with strong relationships with area employer. In my view, there should be a mid-point check in about career field and the investment they have made so that the vision aligns with reality.

8. Is higher education in Ohio addressing the current and future workforce needs of our state, and how can the institution you have been appointed to better address these workforce challenges?

I do think that the State of Ohio has a very robust higher education system that is addressing the current and future needs of our workforce for the most part. One thing that I would like to see accomplished is to increase the transition from college to a local employer here in Ohio. I think the key to accomplishing this is to invite employers to participate in shaping this process.

9. In your view, who are you ultimately responsible to serve as a trustee of the institution you have been appointed to: the president, Board chairperson, or taxpayers of Ohio?

I, along with the president & Board chairperson, are ultimately responsible to the taxpayers of Ohio as they are the ones that are sponsoring the institution.

**Please complete and return this form to the Governor's Office of Boards and Commissions at [boards.commissions@governor.ohio.gov](mailto:boards.commissions@governor.ohio.gov). If you have any questions regarding this form please contact:**

**Senator Jerry C.Cirino**

**614-466-7718**

**1 Capitol Square**

**Columbus, OH 43215**

## GOVERNOR'S APPOINTMENTS TO BOARDS AND COMMISSIONS

**Appointment Date:** 8/2/2024

**Name of Appointee:** Shon P. Anderson

**Address:** 2634 Indian Wells Trl  
Sugarcreek Twp, OH 45385  
Greene County  
(H):  
(W):  
(M): 9376050608  
(E): shon@andersonfinancialstrategies.com

**Name of Commission:** Central State University Board of Trustees  
Laura Wilson, General Counsel and Secretary to the Board of Trustees  
P: (937) 376-6013  
Elizabeth Nash, Special Assistant to General Counsel and Assistant  
Secretary to the Board of Trustees  
P: (937) 376-6629  
1400 Brush Row Rd. / PO Box 1004  
Wilberforce, OH 45384  
(P): 937-376-6629 x6013  
(E): lwilson@CentralState.edu; enash@CentralState.edu

**Term Begins:** 7/1/2023  
**Term Ends:** 6/30/2032  
**Party Affiliation:** Republican  
**Senate Confirmation:** Appointed by the Governor, confirmed by the Senate  
**Financial Disclosure:** Confidential disclosure required  
**Vice:** Sherri Richardson