



For Immediate Release:

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Frank Fantozzi Is Named a Forbes Best-In-State Wealth Advisor for 9th Consecutive Year

CLEVELAND, OHIO - (April 2026) – We're excited to announce that [Frank Fantozzi, CPA, MST, PFS, CDFIA, AIF®, CEPA](#), President and Founder of **Return on Life® Wealth Partners** was ranked **No. 18 out of 110** wealth advisors for the **State of Ohio – Cleveland area** on the **2026 Forbes | SHOOK Best-In-State Wealth Advisors** list. This marks the 9th consecutive year he has been named to the prestigious list. The annual ranking spotlights the nation's top-performing advisors, evaluated based on criteria that includes industry experience, client retention, and assets under management.*

Fantozzi founded the independent Registered Investment Adviser (RIA) firm headquartered in Brecksville, Ohio, in 1994. For more than three decades, he has led the firm's team of experienced financial and investment professionals with a focus on helping high-net-worth individuals and business owners in Ohio and throughout the U.S. to use their wealth to support what brings the greatest meaning and purpose to their lives.

In 2026, the firm was named a **Forbes Best-In-State Wealth Management Team** for the third consecutive year and was ranked 114 out of 148 for the state of Ohio.** With broad experience in areas including wealth accumulation and protection, investment management, business exit planning, executive compensation, estate conservation, and more, the team seeks to bring its diverse perspectives across multiple financial disciplines to each client engagement. The firm's highly personalized Return on Life® approach has enabled the team to build lasting relationships with families and business owners in Northeast, Ohio and throughout the United States.

[View the full Forbes | SHOOK Best-In-State Advisors ranking.](#)

About Return on Life Wealth Partners

Return on Life Wealth Partners is an independent Registered Investment Adviser (RIA) founded in 1994 with headquarters in Cleveland, Ohio. The team provides comprehensive wealth planning services to individuals, families, and business owners. By examining clients' lives before their money, Return on Life® aligns its advice with clients' values and aims to help clients achieve the

milestones that matter most to them. This personalized approach also extends to the institutional and corporate retirement plan services available through 401(k) Prosperity®. For additional information, visit us at ReturnOnLifeWealth.com.



*Frank Fantozzi was named a *Forbes* Best-In-State Wealth Advisor. The *Forbes* Best-In-State Wealth Advisor ranking, developed by SHOOK Research, is based on in-person and telephone due diligence meetings and a ranking algorithm that includes client retention, industry experience, review of compliance records, firm nominations; and quantitative criteria, including assets under management and revenue generated for

their firms. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither *Forbes* nor SHOOK Research receives a fee in exchange for rankings.



**The *Forbes* Best-in-State Wealth Management Teams ranking was developed by SHOOK Research and is based on in-person, virtual and telephone due diligence meetings and a ranking algorithm that includes: a measure of each team's best practices, client retention, industry experience, review of compliance records, firm nominations; and quantitative criteria, including: assets under management and revenue generated for their firms.

Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. SHOOK's research and rankings provide opinions intended to help investors choose the right financial advisor and team and are not indicative of future performance or representative of any one client's experience. Past performance is not an indication of future results. Neither *Forbes* nor SHOOK Research receive compensation in exchange for placement on the ranking. Neither Return on Life Wealth Partners nor any of its financial advisors or RIA firm pay a fee in exchange for this award/rating. To view the full list, please visit <https://www.forbes.com/lists/wealth-management-teams-best-in-state/>. For more information, please see www.SHOOKresearch.com. SHOOK is a registered trademark of SHOOK Research, LLC.

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Investment advisory services offered through Planned Financial Services, LLC, dba Return on Life Wealth Partners, an SEC-registered investment adviser.

For additional information about the firm and our services, see our [Firm Disclosure Brochure \(Form ADV Part 2\) and Customer Relationship Summary \(Form CRS\) Brochure](#).