



Lorie Shah Achieves CFP® Certification, Strengthening Virtue Asset Management's Fiduciary Expertise

With CFP® designation and NAPFA membership, Virtue's financial advisor Lorie Shah strengthens role in company's client-first financial guidance.

BARRINGTON, IL, UNITED STATES, June 23, 2025 /EINPresswire.com/ -- Clients of Virtue Asset Management now have access to deeper financial planning expertise, as one of the firm's veteran advisors, Lorie Shah has earned the Certified Financial Planner™ (CFP®) designation and joined the National Association of Personal Financial Advisors (NAPFA). These milestones signal a stronger commitment to fiduciary guidance, long-term strategy, and client-first service.

“

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The CFP® certification is one of the most respected

designations in the financial industry. It requires rigorous education, ethical training, and real-world experience. Membership in NAPFA, the nation's leading network of fee-only fiduciary advisors, reinforces a strict standard of acting in the client's best interest, free from product sales or commissions.

As one of the area's trusted [independent wealth management firms](#), Virtue focuses on thoughtful planning that evolves with each client's life stage. From retirement income and estate strategy to tax-efficient investing and multigenerational wealth planning, every conversation begins with understanding, not assumptions.

“This marks a meaningful step forward in our advisory capabilities,” said Robert Finley at Virtue Asset Management. “We value experience, but we also value growth, and these achievements deepen the level of service we can provide every day.”

Each [investment management advisor](#) at Virtue brings technical knowledge and a personal approach, combining market insight with steady communication. The team's background in institutional investment (including municipal bond management and fixed income strategy) helps clients confidently protect and grow their wealth.

Virtue Asset Management operates from offices in Barrington, Glenview, Oak Park, and Chicago, IL. As the firm continues to grow, it remains focused on what matters most: helping clients make clear, informed decisions backed by trusted, transparent advice.

Additional information about Virtue Asset Management is available in its current disclosure documents, Form ADV, Form ADV Part 2A Brochure, and Client Relationship Summary report which are accessible online via the SEC's investment Adviser Public Disclosure (IAPD) database at www.adviserinfo.sec.gov, using SEC # 801-123564. Virtue Asset Management is neither an attorney nor an accountant, and no portion of this content should be interpreted as legal, accounting or tax advice.

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