NEWS

For Immediate Release

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BLUE CHIP PARTNERS, LLC
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Blue Chip Partners Promotes Daniel Dusina to Chief Investment Officer

Plus, leading wealth management firm releases new eBook and guide for corporate executives

FARMINGTON HILLS, MI (January 19, 2024) – Blue Chip Partners ("Blue Chip"), an award-winning, independent Registered Investment Advisor (RIA) and comprehensive wealth management firm located just outside of Detroit, recently announced that Daniel Dusina, CFA, former Director of Investments, has been promoted to Chief Investment Officer.

While Dusina's role at the firm – where he heads the in-house investment committee and leads the construction of client portfolios – will remain largely unchanged, the purpose of the promotion and title change was to recognize his significant contributions to Blue Chip Partners and to elevate him within the firm's growing investment department.

"Daniel has been an amazing addition and asset to the team over the past few years," said Robert Steinberg, CEO of Blue Chip Partners. "His six years of experience at BlackRock has significantly enhanced the firm's equity selection process, and his ability to communicate his expertise to our advisors and clients has proven to be incredibly beneficial. We're excited to watch his continued growth and development."

Blue Chip has a distinctive equity investment philosophy: the firm maintains a dedicated investment department that builds client portfolios from the ground up – largely with individual equities focusing on dividend growing "blue chip" stocks – rather than investing in funds.

"We believe that directly owning shares of "blue chip" businesses greatly reduces costs by minimizing third-party management fees," said Dusina. "It also provides more opportunities for tax loss harvesting. In addition, the proximity of clients to key investment decision makers supports a high degree of transparency."

Prior to joining Blue Chip in 2021, Dusina spent six years at BlackRock in New York, where he was a member of the U.S. Income & Value Investment Team within the firm's

Fundamental Equities business. Dusina graduated with a Bachelor of Science in Finance with a minor in Spanish Language from the University of Dayton. He is a member of the CFA Institute and the CFA Society of Detroit.

In addition, Blue Chip recently elevated Vince Parrack from Rotational Program Associate to Investment Analyst. After joining the firm in early 2023 and working a variety of roles, leadership at the firm determined that Parrack's analytical skills were a perfect fit for an analyst role in the investment department.

Parrack will join Dusina in pushing forward key initiatives for the firm and is planning to take part one of the CFA examination in spring 2024 as he works towards becoming a Chartered Financial Analyst. Parrack holds a Bachelor of Arts in finance from Michigan State University and graduated with honors before starting his professional career with Hantz Financial.

To learn more about the investment committee and the full team at Blue Chip Partners, please click here.

BLUE CHIP PARTNERS RELEASES NEW EBOOK FOR CORPORATE EXECUTIVES

One of Blue Chip Partners' areas of expertise is equity compensation planning for executives of publicly traded companies. To further their mission of helping corporate executives address the challenges of accumulating a significant position in company stock, the firm recently released an eBook titled "Making the Most of Your Company Stock Holdings".

This educational guide, authored by Blue Chip's Managing Partner Daniel Seder, CFA, CMT, CFP®, is designed to help executives with large positions in company stock who feel like they are both exposed and missing out on opportunities. Seder identifies key techniques for selling company stock through a structure that helps put the executive, and not the volatile stock market, in control.

"Having a strategic plan to sell company stock leaves executives with the time and mental freedom to enjoy what matters most – their families and businesses," said Seder.

The comprehensive guide offers insight into how trading patterns can be used to optimize sale decisions, how to leverage 10(b)5-1 trading plans to minimize limitations of your blackout periods, and the importance of understanding the time value vs. intrinsic value of stock options.

To download the full eBook, please click here.

ABOUT BLUE CHIP PARTNERS

Blue Chip Partners, LLC (Blue Chip) is a privately-owned, independent Registered Investment Advisory (RIA) firm headquartered in Farmington Hills, Michigan (a suburban area near Detroit). Blue Chip provides personalized wealth management and asset management services, serving as a fiduciary to over 800 client relationships with over $1.2 Billion in assets under management. The advisors at Blue Chip have extensive experience and credentials that provide the foundation for providing comprehensive wealth management and holistic advice to a select clientele. Blue Chip has eight CERTIFIED FINANCIAL PLANNER™ licensees (CFPs), four Chartered Financial Analysts (CFAs), three Certified Public Accountants (CPAs), three Chartered Market Technicians (CMTs), and two licensed attorneys (Michigan). To learn more, visit www.BlueChipPartners.com.

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