

Dené M. Sanfillipo, CEPA®

Managing Partner



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Dené is a financial professional serving medical professionals, business owners, and executives. She started her career with Principal Financial Group® in 1997 immediately following graduation from Ohio State University. She later established Sanfillipo Group in 2001, today operating as Sanfillipo Financial. Dené has been actively educating physicians at Wexner Medical Center since 1998. Educating resident physicians and fellows in training as a founding member of “Residently Speaking”. Dene’ also enjoys working with business owners in the areas of employee benefits, risk management, and exit planning. In January of 2026, Dene’ joined Lake Forest Financial Advisors as a Managing Partner. She obtained her Certified Exit Planning Advisor designation in 2023 to enhance her education and knowledge in Business Consulting and Exit Strategies for business owners.

Dené feels that "This business isn't just about dollars and cents, it's about the client's ability to take care of what's most important. Whether it be a spouse, partner, children, friends, parents, a business, or all of the above; creating a clear path forward can feel more manageable with the right team of educators." She feels that education of complex matters is best to help clients feel comfortable implementing a plan of action.

Dené and her husband James married in 2000 and have three daughters Maria, Gina, and Julia. They currently reside in Dublin, Ohio. In her spare time Dené is a “serial volunteer” with involvement in organizations, such as WiM (Women in Manufacturing), Sams Fans, Cure San Filippo Foundation, Susan G. Komen Race for the Cure to name a few. She is a huge sports fan... especially of THE Ohio State Buckeyes and the Cincinnati Bearcats.