CERTIFIED FINANCIAL PLANNER™

Chartered Financial Consultant® (ChFC®)

Kent State University, B.B.A. in both finance and entrepreneurship, with a minor in marketing

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As a senior manager in the Private Client Services group, Sara strives to provide her clients with incomparable service by developing, implementing and overseeing investment strategies as well as financial plans. Her experience includes working with a broad range of clients including business owners, physicians, attorneys and teachers. This allows her to gain valuable knowledge in many aspects of financial planning.

Sara comes to work each day with the goal to improve each client's financial situation. She works to build long lasting relationships with each client by understanding their unique needs and earning their trust. She is passionate about helping others succeed and will work tirelessly to help her clients achieve financial success.

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