

## Jaime Zarlenga-Siegler, CFP® Managing Director & Partner



### Chagrin Falls Office

33 River Street  
Chagrin Falls, OH 44022

### Oxford Harriman Offices

Akron, Ohio

Astoria, New York

Chagrin Falls, Ohio

Cleveland, Ohio

Detroit, Michigan

Mentor, Ohio

Woodcliff Lake, New Jersey

Park Avenue, New York

Sarasota, Florida

Saratoga County, New York

Westlake, Ohio

[oxfordharriman.com](http://oxfordharriman.com)

Jaime Zarlenga is a Managing Director & Partner at Oxford Harriman & Company in their Chagrin Falls, Ohio office. Jaime helps individuals and families with their investment planning needs, while providing the highest standard of care. Jaime develops and implements a strategic plan that serves as the roadmap for her client's financial and investment decisions. With over twenty years of experience, Jaime's expertise also includes retirement planning and investment management. Jaime works with high-net-worth clients, entrepreneurs, and institutions to deliver a holistic approach to wealth and risk management.

Jaime has been in the financial services industry since 2000 when she started her career at E\*Trade Financial. Prior to joining Oxford Harriman & Company, Jaime was a Vice President and Senior Wealth Strategy Specialist with UBS Financial Services in Pepper Pike, Ohio. Jaime was a financial advisor at McDonald Investments in Cleveland, Ohio prior to that firm being acquired by UBS.

Jaime graduated with a degree in finance with honors from the Fisher College of Business at The Ohio State University, and then went on to earn her Series 7, 63, 65 registrations, insurance licenses, and obtained her CERTIFIED FINANCIAL PLANNER™ certification in 2011.

The CFP® certification identifies those individuals who have met the rigorous experience and ethical requirements of the CFP® Board and who have successfully completed coursework on financial topics in the following areas: general principles of financial strategies, insurance planning and risk management, employee benefits planning, and retirement and estate planning strategies. CFP® certificants also agree to meet ongoing continuing education requirements.

Jaime enjoys spending time with her family in Bainbridge, Ohio, where she resides with her children, Gianna and James.

---

#### ABOUT WELLS FARGO ADVISORS FINANCIAL NETWORK

For 20 years, Wells Fargo Advisors Financial Network, the independent brokerage arm of Wells Fargo & Company, has simplified independence by partnering with successful financial advisors and fostering a mutual passion for doing what's right for clients. We chose to partner with Wells Fargo Advisors Financial Network because they offer a variety of resources available to our clients including access to industry research, technology and world class products. Together, we are able to offer a full-service platform with comprehensive wealth management strategies, including access to lending services through Wells Fargo affiliates.

[www.wfafinet.com](http://www.wfafinet.com)

Wells Fargo Advisors Financial Network is not a legal or tax advisor. Be sure to consult your own tax advisor and investment professional before taking any action that may involve tax consequences. Trust services available through banking and trust affiliates in addition to non-affiliated companies of Wells Fargo Advisors. Wells Fargo Advisors and its affiliates do not provide legal or tax advice. Any estate plan should be reviewed by an attorney who specializes in estate planning and is licensed to practice law in your state.

Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC (WFAFN), Member SIPC, a registered broker-dealer and a separate non-bank affiliate of Wells Fargo & Company. ©2023 Wells Fargo Advisors Financial Network, LLC. All rights reserved. Oxford Harriman & Company is a separate entity from WFAFN. CAR-0323-01269