

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



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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 aiming to provide 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.

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or more than 25 years, Wells Fargo Advisors Financial Network, the independent contractor business model of Wealth & Investment Management (WIM), has offered financial advisors more control, flexibility, and growth around business ownership as well as support from one of the nation's largest financial institutions. WIM offers financial products and services through bank and brokerage affiliates of Wells Fargo & Company. Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC, (WFAFN) Member SIPC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company. Any other referenced entity is a separate entity from WFAFN.