

Jeffrey C. Simon, CFP®

Managing Partner



Contact Jeffrey Simon

Arlington Heights Office
150 W. Campbell Street,
Arlington Heights, IL 60005
847-870-4695
jeff.simon@wfafinet.com

Jeff understands how one's relationship with finances can affect their life. As a child of divorce, he saw his mother deal with many emotions when it came to money, ranging from the stress of saving to the fear of not having enough for later in life.

That experience made such an impression that he has made it his mission for nearly 30 years to help his clients—especially women—take an active, hands-on approach to building and maintaining the financial future they want. Part of that mission includes holding educational events such as Wine, Women and Wealth workshops.

Enjoying the Process

Jeff believes his biggest strength as a Financial Advisor is building relationships, one conversation at a time. Nothing is more important than fully knowing what matters personally—and financially—to his clients.

As part of his process, he wants his clients to clearly define their lifestyle-driven values, goals and priorities. He'll ask: "What life objectives are you hoping to reach by building your wealth?" or "What do you want to achieve by working with me?"

The answers form the foundation of what follows.

When appropriate, Jeff prefers to invite spouses, partners or significant others to those important first conversations and subsequent reviews. Because just as the parts of an investment plan need to work together, so do the people involved.

Seeing the process develop, seeing his clients become more confident and live out their retirement based on the plans they made together brings him a great deal of joy and satisfaction.

Outside the Office

Jeff pays it forward in his community. He serves on many committees and organizations, including the National Association of Women Business Owners (NAWBO) Chicago Chapter Board and as President of the Chicago Lions Charitable Organization, which includes the Chicago Lions Rugby team.

He lives in Northbrook with his wife, and they are proud to have raised three successful sons. He loves being active and won a Gold Medal representing the USA in rugby at the World Maccabiah Games in 1997.

ABOUT WELLS FARGO ADVISORS FINANCIAL NETWORK

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