Sheila Kai Simmons

V.P. Private Wealth Advisor CEPA®

As both a Private Wealth Advisor and CEPA®, I work with a select group of institutional sized clientele with complex balance sheets. My clientele expects me to provide simplicity and insight to them, their business partners, and their family. I've been in the financial industry for 18 years. I'm series 66 and 7 licensed in all states, and insurance licensed in Ohio.

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WORK EXPERIENCE

V.P. Private Wealth Advisor CEPA
UBS Financial Services

05/2021 - Present — *Cincinnati, Ohio*

UBS Financial Services is a wealth management firm.

Achievements/Tasks

- I am uniquely trailed to assist clients with institutional sized balance sheets in growing, preserving, and transferring wealth.

V.P. Wealth Management Advisor
Fifth Third Private Bank

07/2019 - 05/2021 — *Cincinnati, Ohio*

Fifth Third Bank is a National Bank headquartered in Cincinnati, Ohio

Achievements/Tasks

- I was recuited by Brian Lamb to assist in standing up Fifth Third's minority focused wealth management initiative, alongside Joel Stone, Kala Gibson, et al. We exceeding the desired revenue target in year one and was granted the opportunity to build the strategy into four additional markets.

V.P. Client Advisor III
Huntington National Bank

05/2018 - 07/2019 — *Cincinnati, Ohio*

Huntington is a National Bank headquartered in Columbus, Ohio.

Achievements/Tasks

- I was recruited by Andy Hagedorn and Kevin Jones to help build out the Cincinnati wealth management division. I mentored incoming advisors and helped foster internal partnerships with the retail and commercial division for referral opportunities.

V.P. Private Banker
JP Morgan Private Bank, JPMC, Bank One

09/2005 - 03/2018 — *Cincinnati, Ohio*

The JPMC brand encompasses retail banking through institutional investing via the JP Morgan relationship.

Achievements/Tasks

- Top 10% in national sales multiple years, top 10% in leadership multiple years while managing a territory of 21 retail branches, strong revenue producer via net new client inflows in the Private Bank

EDUCATION

Business Management/Finance
University of Cincinnati

09/2001 - 06/2005 — *Cincinnati, Ohio*

Courses

- Business Management/Finance

MBA/Finance
Xavier University

09/2021 - Present — *Cincinnati, Ohio*

SKILLS

Growth Mindset · Leadership · Time Management · Communication Skills · Emotional Intelligence · Collaboration · P&L Management

VOLUNTEER EXPERIENCE

Cincinnati Parks Foundation
Cincinnati Park Board

01/2019 - Present

Cincinnati, Ohio

Tasks/Achievements

- Co-Chaired the Hats Off Luncheon in 2021

Represent Cincinnati
Represent

05/2019 - Present

Cincinnati, Ohio

We provide infrastructure via funding, business coaching, etc to help the existing black owned businesses in OTR become sustainable as well as help attract new.