

**Shana Bielich, CFP**®*Vice President, Financial Advisor Director of Wealth Management*



Shana’s client relationships focus on providing solutions for complex wealth management situations and implementing strategies designed to meet specific client objectives. She is responsible for implementing and monitoring investment strategies as well as advising on complex financial planning matters including deferred comp and stock options.

After receiving a business communications degree from Carlow University, she spent over 10 years with Federated Investors. During her time at Federated, she was exposed to a diverse mix of the financial services industry. She served as a Product Marketing Team Leader which led to a promotion to a Senior Marketing Specialist and Marketing Manager. In this role, Shana gained vast knowledge of investment management products and the capital markets. In 2010, Shana joined the CIS team where she has put her knowledge to work directly with investors.

**CIS Industry Honors**

* Fastest Growing Company

*Pittsburgh Business Times – 2014*

* Best New Campaign

*United Way – 2014*

**Education/Industry Certifications**

* Bachelor’s degree from Carlow University majoring in Business Communications
* CERTIFIED FINANCIAL PLANNERTM practitioner
* Registered ParaplannerSM
* Financial Planning Certificate from Duquesne University
* FINRA Series 7, 63 certified

**Community Service**

* President of the Financial Planning Association, Pittsburgh Chapter
* Former Board member and Treasurer of the Center for Theater Arts, Mt. Lebanon, PA
* Former Committee member of Women’s Leadership and Mentorship Program, Robert Morris University

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