



Sheila S. Shaffer, CFP®

Executive Vice President/Wealth Management | 202.955.4326 | ssshaffer@janney.com

Sheila leads Shaffer Wealth Advisory Group, a multi-generational team, at Janney Montgomery Scott in Washington, D.C.

Sheila's career began as a broker trainee with Merrill Lynch in 1983. In 1987 she joined Legg Mason to open their Winston-Salem, N.C. office. She subsequently helped open numerous Legg Mason offices and held several corporate and management positions in the firm. In 1993 Sheila returned to the Private Client and Wealth Management side of the business as a Financial Advisor to partner with industry stalwart Boyd B. Sibert. This collaboration continued until Mr. Sibert's retirement, and created a legacy that continues to this day. Sheila continued to work at Legg Mason until 2005 when the team became part of Smith Barney under an asset exchange between Citigroup / Smith Barney and Legg Mason. Smith Barney became Morgan Stanley Smith Barney in 2008, where Sheila remained until joining Janney in 2009.

In addition to maintaining her CFP® Sheila currently holds Series 7, 8, 63/65 licenses and is a licensed Life Insurance agent.

AWARDS AND RECOGNITION:

Barron's "Top Women Advisors" – 2006
Financial Times "Top 400 Financial Advisors" – 2014, 2015, 2017
Financial Times "Top 100 Women Advisors" – 2014
Forbes "America's Top Women Advisors" – 2017, 2018
Forbes "Best-in-State Wealth Advisors" – 2018, 2019
Janney Montgomery Scott Financial Advisor of the Year – 2017

IN THE COMMUNITY:

A dedicated member of the Washington, D.C. and Shepherdstown, W.V. communities that she shares with her husband and three Havanese dogs, Sheila supports the Race for the Cure, DC Special Olympics, and the Contemporary American Theater Festival in Shepherdstown WV. Sheila has served, and continues to serve, on a variety of boards and community forums including:

- The National Museum of Women in the Arts (NMWA), President of the Board of Trustees (2014-2016), Treasurer of the Board of Trustees (2010-2014), Board of Trustees (2008-Present)
- DC Chapter of the International Women's Forum (2015-Current)
- Wake Forest University - Past President of the National Wake Forest Clubs, Past President Washington, DC Wake Forest Club, Alumni Council – Past Member
- Janney Montgomery Scott's Financial Advisor Advisory Council and the Janney Board of Managers

Smart Management Smart Wealth:

The Shaffer Wealth Advisory Group specializes in comprehensive wealth management, financial planning, and customized portfolio solutions for affluent investors. We are an experienced group of advisors dedicated to providing our clients with an unparalleled standard of service, financial advice and investment management.

Our Services:

- Financial Planning
- Asset Management
- Investments
- Trusts & Estates
- Insurance & Annuities
- Small Business & Non Profit Services

"Sheila and her team represent an elite group of financial professionals who are dedicated to providing clients with exceptional wealth management services. We recognize their continued dedication to their clients and thank them for their commitment to the success of our Firm. We could not be more proud to have them as a part of our team," Jerry Lombard, president of the firm's Private Client Group, recognizing Sheila as Janney's Financial Advisor of the Year.