



Sevasti Balafas has personally advised on over \$4 billion in assets and has worked directly and successfully with over 700 families to align their investment portfolios with their goals, risk appetite, tax situation and cash flow needs. She started her career in 2001 and has made recommendations and implemented solutions for ultra high net worth, high net worth families and foundations. Sevasti earned her CFA designation, MBA from Wharton and Certified Private Wealth Certification.

She was the Chief Investment Officer of her private wealth team at Lehman Brothers and was a Senior Portfolio Manager at City National Rochdale.

Sevasti listens first, understands your situation, offers solutions tailored to you and implements. Feedback on what clients like most is that she makes them feel confident when they are overwhelmed and speaks in language they understand.

Sevasti started GoalVest in 2017 with the idea of helping clients in all aspects of their financial lives. It's not just about investments for us, it's about financial control.