

Profile

Family Wealth

Key Private Bank
221 South Warren St
Syracuse, NY 13202



Joel Redmond, CFA®, CFP®

Senior Financial Planner
Vice President
Key Private Bank

315-425-8602
joel_t_redmond@keybank.com

Joel Redmond is responsible for providing financial advice and direction to clients with a focus on asset protection, tax reduction, asset distribution and budget and expense management strategies. He works with individuals, families, corporate executives, professionals and business owners to help them reach their current and future goals.

A seasoned professional with 10 years of experience, Joel starts by assessing each client's financial situation, evaluating his or her entire financial picture and outlining strategies that are tailored to fit his or her unique needs. He then puts a customized plan in place that meets the client's specific goals and objectives.

Prior to joining Key in 2011, Joel served as a financial consultant for Wells Fargo Advisors, where he provided investment advisory and financial planning services to institutional and individual clients. He is the industry adviser for the CFA Institute Research Challenge at Syracuse University, as well as a member of the CFA Society of Rochester Program Committee.

Joel earned a BA in English and General Literature from Binghamton University. An adjunct professor of finance at SU's Whitman School of Management, he is also a CFP Board ambassador who routinely talks to national media on financial topics, and the author of The One-Minute Financial Planner, available on Amazon.com.

The Key Private Bank Family Wealth team delivers comprehensive, personalized advice to individuals and families with substantial wealth to address their sophisticated and diverse wealth planning needs. Exclusive access to a highly credentialed team focused on a limited number of clients provides an exceptional level of attention and service. A focus on customized services and educating the younger generation ensures our clients' unique needs are met and family members play an active role in the wealth planning process.

Key Private Bank



Key Private Bank is part of KeyBank National Association.
Investment products are:

• NOT FDIC INSURED • NOT BANK GUARANTEED • MAY LOSE VALUE • NOT A DEPOSIT • NOT INSURED BY ANY FEDERAL OR STATE GOVERNMENT AGENCY

KeyBank does not provide legal advice.

©2014 KeyCorp. 42579