Ed Scheer MBA, CFP®

3rd

Financial Advisor at Waddell & Reed

Greater Chicago Area | Financial Services

Previous Vantage Business Partners

Education Rollins College - Crummer Graduate School of Business

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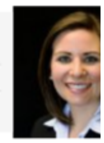
296 connections

https://www.linkedin.com/pub/ed-scheer-mba-cfp®/12/301/863

Contact Info

People



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Background

Summary

As a marathoner and an ultra-marathoner, Ed Scheer has logged countless miles across the country. Ed carries that lifestyle of preparation, training and pacing through to his financial advising. He knows that saving for retirement and other goals is a marathon – not a sprint. This approach requires disciplined investing – not gimmicks such as chasing after an investment or "timing the market." Ed helps his clients find their financial pace during their journey to financial stability. And as often happens in long distance running as well as retirement planning, goals change and course corrections are necessary. Ed has the endurance and experience to lead you through these times as well.

Financial planning can seem overwhelming from the outset, but Ed's running and financial advisory experience has shown him that you can take on a large task and break it down into manageable pieces. He comes from a family of educators and continues on that tradition with his work helping others learn and grow in the financial world, helping them cover new financial territory and becoming a trusted advisor along the way.

Planning your financial goals is a team effort. If you'd like, Ed will work with your accountant, attorney and other specialists to holistically address your needs.

Ed's clients are people who are motivated to make changes in their lives and accomplish their goals – young professionals, business owners, the LGBT community, those in the pre- and post-retirement

bring to families in similar situations.

Whether you are just at the starting line of your financial and retirement planning or nearing the finish line, Ed Scheer has the dedication and experience to help you complete the race.

Experience

Financial Advisor
Waddell & Reed
January 2013 – Present (2 years 9 months)

Providing investment and financial planning services that put your financial goals and objectives first. I look forward to working with you.

Owner/ Principal
Vantage Business Partners
December 2006 – January 2013 (6 years 2 months)

-- Develop and implement comprehensive financial planning solutions for families and business owners
-- Consult with clients' business, banking and tax advisors to deliver integrated and collaborative recommendations
-- Advise on strategic real estate and business investments

Certifications

CERTIFIED FINANCIAL PLANNER™
Starting November 2009

Languages

french
Limited working proficiency

Education

Universite de Paris Sorbonne
Certificate of French Language
1995 – 1996

Rollins College
BA, International Relations
1991 – 1995

Additional Info

- **Advice for Contacting Ed**

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