

Jorge Pereira

Education Specialist, Schwab Retirement Plan Services, Inc.,
Charles Schwab & Co., Inc.

Own your tomorrow

Jorge Pereira

Education Specialist

jorge.pereira@schwab.com

(800) 724-7526

4150 Kinross Lakes Parkway, Richfield,
OH 44286

Professional profile

I can partner with you to understand your goals and provide guidance. Through group and individual education sessions, you'll understand what tools and resources are available to help you take ownership of your financial life.

Financial credentials

- Series 7, 66 Securities Licenses
- Life & Variable Annuity Insurance License

Experience

- 18 years of professional experience
- Education Specialist, Schwab Retirement Plan Services, Inc., 2024-present
- Director, Education, OneDigital Retirement & Wealth, 2015-2024
- Retirement Specialist, SunTrust Bank, 2012-2015
- Financial Advisor, JPMorgan Chase, 2009-2012
- Financial Advisor, MassMutual, 2006-2009