

Jordan Heller, BS, MBA, CPA, CFA, CFP Board of Trustees Member



Jordan Heller, a prominent investment management professional in New York, joined the NYCPM Board of Trustees in August 2013. He is president of Heller Wealth Advisors LLC, formerly SMG Wealth Management LLC. Prior to its spin-off in March 2008, SMG Wealth Management was a wholly-owned subsidiary of The Schonbraun McCann Group LLP, the nation's largest independent real estate and finance-dedicated advisory and accounting firm. Mr. Heller was a partner of The Schonbraun McCann Group as well as managing partner of SMG Wealth Management. Jordan and his team are dedicated to comprehensive wealth management, with an emphasis on real estate and finance executives and their families. He also provides advisory services to real estate and finance companies and their senior executives.

Prior to joining The Schonbraun McCann Group, Mr. Heller spent four years at American Economic Planning Group (AEPG) in a similar capacity. Prior to AEPG, Mr. Heller spent 15 years on Wall Street heading the Real Estate and Real Estate Finance Securities Research groups at some of the U.S.'s leading investment houses, including Merrill Lynch, Salomon Brothers and CIBC. In this capacity, he played a central role in the birth of the modern day REIT industry, as witnessed by his transaction summary below. Mr. Heller began his career in public accounting, joining Price Waterhouse in 1982, moving to Wall Street in 1985.

Mr. Heller obtained his undergraduate degree from Bentley University in Waltham, MA, with a B.S. in Accountancy (high honors). He obtained his MBA from The University of Chicago's Booth School of Business (honors). Jordan also serves on the Board of Directors of Bed Bath and Beyond, Inc. and Equity One. He is a member of the Investment Management Consultants Association, Association for Investment Management and Research and the New York Society of Security Analysts. He is a noted speaker and has been featured as an industry expert by such media as CNN, Bloomberg, The Wall Street Journal, Barron's, The New York Times, and Real Estate Portfolio.

Jordan Heller resides in Warren, NJ with his wife and three children.