

Joanna Rrezja

Joanna Rrezja is a Financial Advisor and Financial Planning Specialist at The Westchester Group. She began her career in financial services at Morgan Stanley in 2019, joining The Westchester Group in 2021. Her primary responsibilities include establishing and maintaining client relationships, with a special focus on financial planning to help meet client goals and objectives.

Like many, Joanna has had more than one successful career. After graduating from Pace University with a BBA in Finance, she spent years in luxury retail management, managing stores for top brands like Saks Fifth Avenue, Alice + Olivia, and Vince. Her entrepreneurial spirit led her to launch Marak Boutique in 2019, an evening wear boutique in Dobbs Ferry, NY.

Her retail career began in sales as a Style Advisor. Much like a Financial Advisor builds portfolios for their clients based on their unique goals, risk appetite, and the financial climate, Joanna helped her clients with their fashion investments by building a wardrobe based on their lifestyle and body type. Her clients trusted her as their personal style expert, advising on fashion trends, and then personalizing them to fit their needs. However as she began moving up the ranks from sales to management and her responsibilities shifted to coaching and development of her staff, Joanna soon realized she missed her favorite part of the job - the client relationship aspect of retail sales. Her decision to pursue a career as a Financial Advisor was a natural transition based on her interest in helping others, seeing a need and desiring to meet it.

As a woman and first generation American born to Albanian immigrants, Joanna knows first-hand the challenges many face when planning for their future and reaching for financial independence. She is passionate about financial coaching and empowering women with financial literacy, with a special emphasis on divorcees. Joanna's unique experiences and broad perspectives bring both the knowledge and empathy needed to help clients financially achieve what is most important to them. Once she has a complete understanding of her clients' goals, Joanna then works closely with Ellis and Jon to help design and implement financial life plans integrated with informed portfolio management.

Outside of work, Joanna enjoys reading and getting outdoors. She has a keen interest in learning about different cultures, frequently traveling abroad. She currently resides in the Bronx, New York and is an Ursuline School alumna.