

Ballston Spa National Bank Announces Appointment of Jeffrey B. Goliber to VP, Director of Wealth Management Solutions

Experienced retirement and investment officer joins BSNB's to lead growing Wealth Management Team

BALLSTON SPA, NY, UNITED STATES, April 23, 2025 /EINPresswire.com/ -- [Christopher R. Dowd](#), President and CEO of [Ballston Spa National Bank](#) (BSNB) today announced that [Jeffrey B. Goliber](#) has joined the bank as its new Vice President, Director of Wealth Management Solutions.



Jeff's client-first philosophy aligns perfectly with our commitment to earning trust and building long-term relationships with BSNB customers."

Pamela Montpelier, Senior Vice President, Growth and Experience Officer

In his new role, Goliber will lead a team of experienced trust and investment officers, along with a dedicated Wealth Management Client Services and Operations team, all committed to delivering a highly personalized and disciplined approach to managing wealth, estate planning and trust administration.

Together, they will develop forward-thinking investment strategies and customized retirement and estate plans that help clients grow, protect, and preserve their wealth for future generations.

Prior to this position, Goliber served as VP, Retirement Plan Services Manager for Arrow Financial Corporation (Formerly Glens Falls National Bank and Trust Company) where he led the retirement plan services team, spearheaded business development initiatives and worked closely with clients to provide strategic investment solutions. He also held roles at Ayco/Goldman Sachs, Scottrade Financial Services and TD Waterhouse, where he specialized in investment management, wealth planning and retirement strategies for high-net-worth individuals, businesses and families.

"We're excited to welcome Jeff to the BSNB team," said Pamela Montpelier, Senior Vice President, Growth and Experience Officer. "Jeff has dedicated his career to helping individuals and families plan for retirement, manage their assets, and make sound investment decisions. His client-first

philosophy aligns perfectly with our commitment to earning trust and building long-term relationships with BSNB customers.”

Goliber was born and raised in Ballston Lake and lives in Wilton, NY with his family. He serves as Vice President of the Board of Directors for the Franklin Community Center and serves on the executive, governance and finance committees. When he’s not at his desk working with clients, Jeff enjoys a wide range of outdoor sports including fishing, golf, hiking and spending time at his family camp on Great Sacandaga Lake.

“Ballston Spa National Bank has deep roots in this community built on longstanding relationships and earned

trust, and I’m honored to lead a team that celebrates that tradition,” said Goliber. “Nothing is more rewarding than helping our customers plan for a successful retirement and grow their investments. We’re helping them build a legacy that will last for generations.”

BSNB’s Wealth Management Solutions provides on-going advice and supervision of clients’ assets while attending to myriad details relating to account management. This includes building relationships and understanding needs; customizing an investment strategy that is objective and cost efficient, managing accounts to keep customers on track while minimizing risk and maximizing returns, and providing unparalleled service.

ABOUT BALLSTON SPA NATIONAL BANK

Ballston Spa National Bank (BSNB) is a locally focused, relationship-driven community bank invested in making a difference not only for customers but its community. With 13 locations headquartered in Ballston Spa, NY BSNB offers a wide range of financial products and services to individuals, families, municipalities, nonprofits, and businesses throughout New York’s greater Capital Region. Learn more about BSNB’s offerings here. To become part of BSNB’s online community, please visit Facebook, Instagram and LinkedIn.

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