EVERGREENWEALTH

LONG FORM BIO

Sarah Mogill
Director of Strategy, Evergreen Wealth

Sarah Mogill is the Director of Strategy at Evergreen Wealth, where she helps shape the company's strategy across advisory, sales, and marketing. As one of Evergreen Wealth's first employees, Sarah played a pivotal role in developing the company's investment products as Group Product Manager and establishing critical partnerships before expanding her focus to lead business strategy.

Sarah brings over a decade of experience at the intersection of wealth management, digital strategy, and financial technology. Before joining Evergreen Wealth, Sarah was Senior Vice President and U.S. Wealth Financial Planning Strategy Lead at Citi, where she developed a global roadmap for Citi Wealth Management's financial planning tools. She aligned cross-functional wealth teams, including Product and Advisory, to provide leadership with data-driven insights to guide strategic decision-making and growth.

Earlier in her career, Sarah was a Product Manager at Betterment, where she launched Connected Accounts on the Betterment app and reimagined their end-to-end Transactions experience. She also helped modernize transactional experiences and collaborated on marketing campaigns that boosted app ratings. Sarah also spent six years at JPMorgan Chase in various roles, including Product Manager in Digital Wealth Management, where she supported high-profile launches, such as Chase Sapphire Reserve and You Invest by JPMorgan, the firm's first advisor-less investment platform for both self-directed investing and robo-advising. She also developed and launched key innovations for Wealth Plan by JPMorgan, such as External Account Aggregation, and Spending Summary and Cash Flow Analysis, tools that gave clients deeper visibility into their finances and became core features in JPMorgan's digital ecosystem.

Sarah earned her Bachelor of Science in Management Information Systems from Penn State University.

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Sarah Mogill
Director of Strategy, Evergreen Wealth

Sarah Mogill is Director of Strategy at Evergreen Wealth, where she drives firmwide initiatives across advisory, sales and marketing. As one of the company's earliest employees, she helped build Evergreen's investment product before expanding her focus to broader business strategy.

Previously, Sarah was Senior Vice President and U.S. Wealth Financial Planning Strategy Lead at Citi and a Product Manager at Betterment. Sarah began her career and spent six years at JPMorgan Chase, where she supported the launch of Chase Sapphire Reserve and You Invest by JPMorgan, the firm's first advisor-less investment platform for both self-directed investing and robo advising, as well as innovative client tools like External Account Aggregation, Spending Summary and Cash Flow Analysis for Wealth Plan by JPMorgan.

She holds a B.S. in Management Information Systems from Penn State University.