



Series 65 registration

The Ohio State University, B.S. in
Business Administration



Annie Sidwell

Director, Wealth Management

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As a Financial Advisor in Sequoia's Wealth Management segment, Annie is responsible for guiding families through the complexities of financial decision-making through comprehensive financial planning, portfolio design, and understanding intergenerational wealth. With more than eight years in the financial services industry, and having grown up within a family owned business, Annie has developed a deep understanding of the challenges facing clients through personal experience. It is this experience that propels her forward in educating clients and empowering them to reach their financial goals.

Clients who work with Annie can expect her to keep their personal goals at the forefront, helping them to make decisions today that will help them achieve their long-term objectives. She considers it a privilege to use every tool at her disposal to serve as a resource to her clients and enrich their lives.

Investment advisory services offered through Sequoia Financial Advisors, LLC, an SEC Registered Investment Advisor. Registration as an investment advisor does not imply a certain level of skill or training.

