



CERTIFIED FINANCIAL
PLANNER™

Certified Public Accountant
(Inactive)

Series 7 registration (*inactive*)

Capital University, B.A. in
Accounting and Finance



Brian Stertzzer, CFP®, CPA (Inactive)
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As a lead advisor focused on wealth management and evidenced-based strategic, multi-factor investment solutions, Brian is committed to advancing Sequoia's mission to Enrich Lives™. He considers it a privilege to serve as Program Director for Armada, a multi-advisor investment solution with Sequoia clients. The unifying factor in all of his work has been, and remains, guiding clients on the path to achieving their financial goals with honesty and integrity.

After four decades in the financial services industry, Brian remains fascinated by the unique challenges presented to investors and is energized by crafting evidence-based solutions for every client's unique circumstances. Working specifically in asset management since 1984, he has learned that investing requires a humble attitude and a never-ending quest to build a low cost and tax efficient portfolio.

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.

