



CERTIFIED FINANCIAL
PLANNER™

ACCREDITED ESTATE
PLANNER® (AEP®)

CERTIFIED TRUST &
FINANCIAL ADVISOR (CTFA)

Acquired the Series 7
registration (*inactive*)

Acquired the Series 66, The
Uniform Combined State Law
Examination (*inactive*)

Serves on the Investment
Committee for the Goodwill
Board of Directors

Member of the National
Association of Estate Planner &
Council (NAEPC)

Member of the Accredited
Estate Planner (AEP)
nomination Committee

Graduate Certificate in estate
planning and taxation from The
American College

The American College,
M.S.F.S., Master of Science in
Financial Services

Speaker at national Salesforce
conferences and featured
Salesforce Trailblazer

The University of Akron, B.S. in
finance, cum laude

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.



Trevor Chuna, CFP®, AEP®, CTFA, MSFS
Chief Technology Officer

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As Chief Technology Officer, Trevor is charged with making decisions for the strategic direction of technology at Sequoia. Along with the execution of Sequoia's tech strategy, Trevor oversees the technology roadmap, budgeting, and planning. Fully understanding clients' needs and desires is paramount, and Sequoia's technology strategy is reflective of that.

Trevor works closely with advisors and firm leadership to identify opportunities that improve operational efficiency, effectiveness, and impact on client experience with the use of technology. He strives to add value by supporting relationship intelligence through technology which allows Sequoia to deliver more personalized services and make informed decisions that will increase the productivity of each team while helping clients achieve their financial goals.