CERTIFIED FINANCIAL PLANNER ™

Accredited Estate Planner® (AEP®)

Series 7 registration *(inactive)*

Series 66 registration

Ohio Life, Health and Variable Insurance Licensed

Member, Estate Planning Council of Cleveland

University of Toledo, B.B.A. in finance

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As a Senior Manager in Sequoia's Family Wealth Practice, Jill has the privilege of working with generations of high net worth families, corporate executives and entrepreneurs. Together with the team at Sequoia, she focuses on the creation and implementation of highly customized wealth plans, that allow clients to achieve their lifetime and legacy goals. She is honored to build lasting relationships that result from understanding a client's personal and financial situation, concerns and aspirations.

It is truly rewarding for Jill to see a well-crafted and uniquely individualized financial strategy transform into reality over time. Her goal is to earn the position as a trusted advisor for the clients she works with and their families. To that end, Jill is dedicated to unparalleled client service and continuous professional development required to be the best advocate in an ever-evolving financial landscape.