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 an advisor at Sequoia I have the privilege of working with many corporate executives and entrepreneurs. Together with our team at Sequoia, I focus on the creation and implementation of customized wealth plans, that allow for our clients to achieve their lifetime and legacy goals. I am honored to build lasting relationships that result from understanding a client's personal and financial situation, concerns, and aspirations.

It is truly rewarding to see a well-crafted and uniquely individualized financial strategy transform into reality over time. It is my goal become a trusted advisor for our clients and their families. To that end, I am dedicated to unparalleled client service while working toward enriching lives and being the best partner for our clients in an ever-evolving financial landscape.

SEQUOIA FINANCIAL GROUP