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

Member of Fidelity CIO Advisory Council

Member of Salesforce Financial Services Advisory Council

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

SEQUOIA FINANCIAL GROUP

Trevor Chuna, CFP®, AEP®, CTFA, MSFS
Chief Technology Officer
330.255.2121| tchuna@sequoia-financial.com

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.