CERTIFIED FINANCIAL PLANNER™

Certified Public Accountant (CPA)

Miami University, B.S. in accounting and finance

Has studied corporate and estate tax in The University of Akron's master's in taxation program

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As a financial advocate for my clients, Michael works with Sequoia's lead planners to design and implement financial plans that are drafted with the end goal of helping to preserve and maximize clients' wealth. His career has been dedicated to assisting affluent clients in the areas of charitable planning, retirement planning, wealth transfer and business succession planning. Michael takes pride in and is truly passionate about creating financial plans that offer thoughtful, intelligent and custom-tailored solutions to help clients achieve their overall financial goals.

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