



Series 6, 7, 63 and 65
Registrations

Ohio Insurance License,
Accident, Life, and Health

Wittenburg University, Bachelor
of Marketing & Finance



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As a Vice President in Sequoia's Private Client Services Group, I work with individuals, business owners, retirees and families to create comprehensive, holistic financial plans that propel them toward their financial goals. I am driven to deliver excellence in my client relationships, equipping clients with the unbiased information and the tools necessary to create the life they've imagined for themselves and their legacy.

Financial planning is all about you, the client. My role is to listen first, to understand my clients' needs and aspirations, and then to leverage the full strength of the Sequoia Team for the client's benefit. I strive to become a trusted partner as they work toward accomplishing their goals and protecting what matters most to them. I am passionate about open communication and providing value to my clients, keeping them abreast of developments in the ever-changing financial landscape and adjusting their plans to keep pace.

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.

