



CERTIFIED FINANCIAL
PLANNER™

Certified Public Accountant
(CPA)

Personal Financial Specialist
(CPA/PFS)

Chartered Global Management
Accountant (CGMA®)

Series 7, 24 and 63
registrations (*inactive*)

Member, Ohio Society of CPAs

Member, American Institute of
CPAs

Member, Financial Planning
Association

Member, KPMG Asset
Management Tax Peer
Exchange Group

Miami University, B.S. in
accountancy

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.



Gerry Knotek, CFP®, CPA/PFS, CGMA®

Executive Vice President

Chief Compliance Officer

330.255.4323 | gknotek@sequoia-financial.com

As a financial planner, Gerry values the opportunity to help people as they work to reach their financial goals and navigate the challenges they face along the way. In particular, he provides comprehensive planning for individuals and small businesses in the areas of retirement planning, investment management, insurance strategies, asset allocation, and estate and succession planning.

One of his passions is helping his business owner clients plan for the transition from their current venture into the next phase of their lives. His background as a CPA allows him to make those transitions as seamless as possible. Additionally, his previous experience in the “big” firms has given him a great perspective to pass onto his clients. In turn, his clients have given him their trust and confidence, which is something he appreciates each and every day.

From a management perspective, Gerry is a part of Sequoia’s executive team and serves as Chief Compliance Officer. He helps manage the firm in various ways.. He also participates on the firm’s investment committee which reviews investment performance and strategies for the firm, and he actively mentors other Sequoia professionals.

