Tufts University, Bachelor of Arts in Economics

Harvard Business School, Master of Business Administration

SEQUOIA FINANCIAL GROUP

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Each day, I strive to bring the power of more than 20 years' experience in the Private Wealth Management industry to Sequoia's team. My goal is to leverage skills honed by a wide range of experience in both the operational and managerial aspects of the RIA space to benefit our advisors and clients.

I feel deeply connected to Sequoia's mission, vision and values, and serve as resident strategist to the Family Wealth Team, offering insights to both the team and to individual advisors as they seek to build deeper client relationships and refine the client experience through individualized service. I work to help refine the firm's digital growth strategies and play an active role in helping to attract the next generation of creative advisors to the Sequoia Team.

I graduated Phi Beta Kappa and summa cum laude from Tufts University earning a BA in Economics. After graduating, I pursued an MBA from Harvard Business School.