



CERTIFIED FINANCIAL  
PLANNER™

The Chartered Life  
Underwriter® (CLU®)

Series 7 and 66 registrations  
(inactive)

Miami University, B.S. B.A. in  
finance and decision sciences



David Massare, CFP®, CLU®

Vice President, Private Client Services

330.255.4335 | [dmassare@sequoia-financial.com](mailto:dmassare@sequoia-financial.com)

With more than 15 years of experience in the financial services industry, Dave works with a wide variety of clients including business owners, entrepreneurs, physicians, retirees and more. His clients look to him for help in developing and implementing their financial, estate and business succession plans. The development and especially implementation phase of the process will often involve coordination with the client's accountant, attorney, and other professionals. Dave prides himself on being able to collaborate efficiently and effectively with these professionals to ultimately get things done. This ability to execute is something the entire team at Sequoia takes pride in, and something Dave believes truly differentiates the firm in the industry.

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.

