CERTIFIED FINANCIAL PLANNER ™

Series 7 registration *(inactive)*

Series 63 registration *(inactive)*

University of Michigan, B.B.A. with concentrations in finance and accounting, high honors

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Annie joined Sequoia in 2002 and draws upon her years of experience working with ultra-high net worth individuals, business owners, family offices and trustees to deliver customized planning solutions. She employs an unwavering commitment to client service and technical excellence, while advocating on behalf of her clients.

As Senior Vice President of the firm's Family Wealth department, Annie seeks to continually expand and evolve the ways in which we are able to provide our clients with clarity, confidence and control over their financial future.

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