



CERTIFIED FINANCIAL  
PLANNER™

Series 7 registration (*inactive*)

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University of Michigan, B.B.A.  
with concentrations in finance  
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G2 Leadership Institute



Annie McCauley, CFP®

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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.

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.

