University of Akron, MBA – Finance

Ohio University, BBA - Accounting

Series 7 and 66 registrations *(inactive)*

Former member of the FPA (Financial Planning Association)

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As a client service manager, Tracy enjoys working with Sequoia's advisor team and clients each day. Her goal is to provide clear communication, excellent service, and an overall exceptional experience for the firm's clients. She has more than 20 years of industry experience that helps her navigate a wide variety of client needs and situations. Tracy is passionate about helping clients along their path to financial health and success.