



Series 65-NASAA Investment  
Advisors Law Exam

Passed CFA Level I

The Ohio State University, B.S.  
in Finance and B.A. in  
Economics



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Henry helps to ensure the firm is up to date on any relevant market events that may impact the value of our clients' investments. He develops and monitors processes that enable us to analyze almost every asset class and assess whether our investments have been a top performer (on a risk-adjusted basis) within their respective category. Henry helps build, monitor, and evolve our firm's model allocations, to assisting them to maintain appropriate asset class exposures and reflect our department's strategic view.

Whenever advisors require additional information about a particular asset class or investment he provides analysis that helps provide clarity to their questions. Additionally, Henry provides support within the Asset Management Department in regards to trading and reporting.

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.

