CERTIFIED FINANCIAL PLANNER ™

Series 7 registration *(inactive)*

Miami University, B.S. in business with a concentration in finance

Kristan Preston, CFP®
Vice President, Private Client Services
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As an advisor in the firm's Private Client Services department, Kristan's focus is to develop meaningful relationships with clients so that she becomes a partner in creating the path to help them reach their financial goals. The strength of these relationships allows her to have a better understanding of how clients' many financial variables impact their long term planning goals and objectives. She enjoys working with clients to educate and constantly navigate the multitude of financial decisions that face them throughout their lifetime as well as for their future generations.

Kristan utilizes the depth of Sequoia's dedicated asset management and comprehensive wealth planning teams, to develop a plan together, manage investment assets, and create an environment that is conducive for financial decision making. She takes great pride in breaking down the complex obstacles and decisions clients face to deliver valuable advice. Her priority is that her clients have clarity and confidence in Sequoia's process and recommendations, and to ultimately become their most trusted professional advisor.

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