CERTIFIED FINANCIAL PLANNER™

Series 7 and 66 registrations *(inactive*

Mount Union College, B.A, Business Administration, concentration in finance

SEQUOIA FINANCIAL GROUP

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As executive vice president of Sequoia's Private Client Services group, Jeff oversees the strategic direction and growth of the division. He is responsible for recruiting, retention, tactical initiatives and works closely with Sequoia's planning, asset management, client service and technology teams to ensure financial advisors have the resources they need to best serve their clients.

Jeff also serves as a lead client advisor and has more than 15 years of experience providing investment advisory and wealth management services to high net worth individuals and their families. His current client base includes business owners, professional service providers, physicians, executives and retirees. He understands that making client centered decisions is key when working toward long-term client success and makes it his goal to always put the client first.