



CERTIFIED FINANCIAL  
PLANNER™

Certified Fund Specialist® (CFS®)

Certified Investment  
Management Analyst™ (CIMA®)  
professional

Accredited Investment Fiduciary  
Analyst™ (AIFA®) designee

Series 7 and 63 registrations  
*(inactive)*

Member, Financial Planning  
Association (FPA)

Member, Investment  
Management Consultants  
Association (IMCA)

Member, Society of Financial  
Service Professionals (FSP)

The Ohio State University, B.A. in  
organizational communications



Bill Venter, CFP®, CFS®, CIMA®, AIFA®

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Bill has spent more than 25 years helping clients in their efforts to accumulate and protect their wealth through comprehensive financial planning that is centered around each client's unique goals and objectives. He is passionate about the firm's clients and strives each day to help them realize and achieve their financial hopes and dreams while working with our Sequoia team to deliver exceptional service.

Bill loves strategizing with clients, but his enthusiasm for his work really stems from the relationships he is fortunate enough to build with each client he has worked with over the years.

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.