

CERTIFIED FINANCIAL PLANNER
TM

Accredited Estate Planner® (AEP®)

Master of Science in Financial
Services (MSFS)

Member of the NAEPC's Diversity,
Equity, & Inclusion Task Force

Serves as President Elect for the
Cleveland-Akron Chapter of the
Society of Financial Service
Professionals

Member of the Estate Planning
Council of Cleveland

Panelist: Collaborative Planning for
Closely-Held Business Owners and
Their Families (4/2018 - Cleveland-
Akron Chapter of the Society of
Financial Service Professionals) &
Estate Planning Opportunities in
Turbulent Times (5/2020 - Estate
Planning Council of Cleveland)

Facilitator of monthly Planning
Forum calls for HIFON (High
Impact Financial Operations
Network)

Selected for participation in The
G2 Leadership Institute through
The Ensemble Practice

The American College, Master of
Science in Financial Services

Mercyhurst University, B.A.
business with a focus in finance
and a B.A. in dance, summa cum
laude

Awarded with the Greater Akron
Chamber's 30 for the Future
award and the Women's Network
of Northeast Ohio's Women of
Professional Excellence recognition
for 2019

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.



Heather Welsh, CFP®, AEP®, MSFS
Vice President, Wealth Planning
330.255.2124 | hwelsh@sequoia-financial.com

As Vice President of Wealth Planning, Heather determines strategic direction for the planning solutions created for clients and oversees the management and career development of Sequoia's Wealth Planning team. She collaborates with the firm's advisors and external partners to help clients achieve their wealth planning goals and objectives. Heather focuses on planning for business owners through her leadership of the Wealth Planning Department's closely-held entity pillar.

In addition, Heather develops planning-based recommendations and strategies for clients both through and outside of the formal planning process.