



Chartered Financial Analyst®
(CFA®)

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Candidate



Jack Zhang, CFA®

Chief Investment Strategist

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As Chief Investment Strategist, Jack works primarily with the Asset Management Team and serves on the Investment Committee helping to build client portfolios as well as research alternative investments. He works in general asset allocation and portfolio construction and concentrates his time on the firm's investment research and due diligence efforts across equities, fixed income, and alternative investments.

With 10 years of experience working across a wide range of asset classes with specialization in alternative investments, Jack is focused on providing clear and concise research ideas. He enjoys working with clients regularly on the investment side to reinforce the firm's investment philosophy, discuss current market trends, review pipeline of investment ideas, and propose portfolio change that he believes are value-additive.

His goal is to deliver attractive risk-adjusted performance to help clients meet their personal wealth goals. He helps to achieve this objective through wide coverage of the investment universe and consistent application of our investment principles to guide clients during times of irregular market performance. He also seeks to continue our history of enduring client relationships and satisfaction through consistent investment education. Jack considers it a privilege to play a role in creating an exceptional client experience.

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.

