



Ohio Dominican University, B.S.  
in Accounting, MBA in Finance



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As an Operations Analyst, I am pleased to work with Sequoia's Asset Management team to ensure that client accounts are on target with their desired strategy and are aligned with their financial plan. Clients can expect me to be proactive on their behalf, looking for opportunities to effectively manage their portfolios to help them achieve their individual financial objectives.

Having spent many years working in corporate accounting before transitioning to wealth management, I have an appreciation for balancing strategic goals with cost efficiency. My primary objective is to work within my sphere, helping to maintain and rebalance accounts to keep our clients on track to accomplish their goals. I consider it a privilege to do work that inspires and challenges me and serves a far greater purpose: to Enrich Lives™.

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