



Form ADV Part 2B Brochure Supplement

Joseph Craig Ferree, Jr. (Craig Ferree)

Item 1 – Cover Page

Joseph Craig Ferree, Jr. (Craig Ferree)
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Palm Springs, CA 92262
760-282-8015
www.SequoiaWealth.com

Date of Supplement: Confirmed January 2018

This brochure supplement provides information about Joseph Craig Ferree, Jr. (Craig Ferree) that supplements the Sequoia Wealth, LLC (“Sequoia Wealth”) disclosure brochure. You should have received a copy of that brochure. Please contact Craig Ferree at 760-282-8015 or craig@sequoiawealth.com if you did not receive Sequoia Wealth’s brochure or if you have any questions about the contents of this supplement.

Additional information about Joseph Craig Ferree, Jr. (Craig Ferree) is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Born: 1958
CRD # 1173801

Post Secondary Educational Background:

- Hobart College, Bachelor of Arts in Psychology and History: 1980

Business Background:

- Sequoia Wealth, LLC, Managing Member and Chief Compliance Officer, 12/2013 to Present;
- NestEgg Investment Advisors, LLC, Managing Member and Chief Compliance Officer, 06/2013 to 12/2013;
- Body2Body LLC, CEO & Founder, 10/2010 to 12/2013
- American Beauty Products LLC, Managing Member, 05/2010 to 12/2010
- Self Employed, Real Estate Developer, 12/2007 to 06/2010
- Susan Gale Group, Director of Residential Sales, 09/2005 to 10/2007
- Self Employed, Real Estate Developer, 03/1993 to 09/2005

Summary of Work Experience:

Craig Ferree began asset management work in 1982 as a Registered Representative for the brokerage house Moseley, Hallgarten, Estabrook and Weeden, Inc., Philadelphia, Pennsylvania.

Mr. Ferree moved in 1984 to Mellon Bank, N.A. in Philadelphia, where he served as a Trust Officer in Trust Administration before taking a position in 1986 as Trust Investment Officer, Private Wealth Management, Mellon Bank, N.A until 1989.

As an Investment Officer, Trust & Investment Department, Southeast Bank, N.A. of Miami, Florida, he managed Personal Trust, Family Complex, Charitable Foundation and Investment Advisory accounts. He left Southeast Bank, N.A. in 1992 to pursue interests in Real Estate Development in Miami Beach, Florida.

In 2010, Mr. Ferree entered the Health & Wellness industry with his formation of American Beauty Products, LLC in Palm Springs, California and later, Body2Body LLC of Palm Beach Gardens, Florida. From June 2013 to December 2013 he was with NestEgg Investment Advisors, LLC in Palm Springs, California. In December 2013 he formed the wealth management firm, Sequoia Wealth, LLC of Palm Springs, California.

Item 3 – Disciplinary Information

Mr. Ferree has no legal or disciplinary events to report.

Item 4 – Other Business Activities

Mr. Ferree is not engaged in any outside business activities.

Item 5 – Additional Compensation

Other than his normal salary and share of profits as an owner of the firm, Mr. Ferree receives no additional compensation from investment advisory services.

Item 6 – Supervision

Mr. Ferree is the Chief Compliance Officer of Sequoia Wealth. He is responsible for overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives. He can be contacted at 760-322-4622.

Item 7 – Requirements for State-Registered Advisers

Mr. Ferree has not been involved in an arbitration award and has not been found liable in an arbitration claim alleging damages in excess of \$2,500. He has not been involved in any award or found liable in any civil, self-regulatory organization, or administrative proceeding. Additionally, he has not been the subject of a bankruptcy petition.