



Sara L. Seely, CFA  
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Sara Seely joined Equistar Wealth Management as a Principal in 2013. Over 15 years of experience in financial services, she provides investment management and comprehensive financial planning to busy professionals and their families. Sara's clients value the personal attention and high level of customized advice offered at Equistar. Acting as personal CFO for her clients, Sara works through complex financial issues to plan for a successful future.



Previously, Sara was senior advisor at Durbin Bennett Private Wealth Management, and a founding member and director of research at WaterStreet Investment Consultants, an institutional investment consulting firm managing over \$2 billion. At WaterStreet, Sara led the firm's Investment Committee responsible for investment manager due diligence and capital markets research. She began her career as an analyst in the Institutional Consulting Group at Smith Barney, where she was named Divisional Analyst of the Year.

Sara has valuable experience helping large institutional clients, including pension plans, endowments, foundations and 401(k), select the proper allocation to meet the needs of each plan. She regularly draws from these investment principles to help individuals and families achieve their financial goals.

She earned a bachelor of business administration degree in finance, summa cum laude, from Texas Tech University. She earned a Chartered Financial Analyst (CFA) designation, and served on the Board of Directors of the CFA Society of Austin since 2006, including a term as President in 2012. Sara serves on the Investment Committee for Austin Community Foundation as well as Hospice Austin. She is a member of the Development Council for SAFE Alliance, a partnership between SafePlace and Austin Children's Services. Sara is also a member of the Women's Fund of Central Texas where she serves on the grants committee.

A native Texan, Sara has lived in Austin for over 13 years where she enjoys live music, cycling and the outdoors. She and her husband Chad stay busy with their two daughters, family and friends.

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