



Sara L. Seely, CFA
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Sara Seely joined Equistar Wealth Management as a Principal in 2013. Over 20 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 holds a Chartered Financial Analyst (CFA) designation and served on the Board of the CFA Society of Austin for 7 years, including a term as President in 2012. Sara has been recognized as "Five Star Wealth Manager – Best in Client Satisfaction" by Texas Monthly and was a finalist in the 2016 Austin Under 40 Awards. She serves on the Investment Committee for Austin Community Foundation as well as Hospice Austin and has volunteered at SAFE Alliance and the Women's Fund of Central Texas. Sara is a member of the 2018 Leadership Austin Essential Class.

A native Texan, Sara has lived in Austin for over 18 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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