

Sierra Ridge Celebrates Four Years of New Heights

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Co-Founders Giancarlo Foti and James Slaughter have enjoyed robust growth since identifying untapped potential in the independent [financial professional](#) space.

“

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*James Slaughter, Co-Founder
of Sierra Ridge Wealth
Management*

This year, Sierra Ridge Wealth Management (Sierra Ridge), a full-service financial firm based in Sacramento, CA, marked four years in operation. In that time, Sierra Ridge has turned heads thanks to its impressive growth, innovative partnership structure, and stacked line-up of support services for financial advisors.

Since Co-Founders Giancarlo Foti and James Slaughter came together in 2018 to establish the firm, Sierra Ridge has grown to 17 financial professionals across five states.

What's more, they have plans to expand to the East Coast. Foti credits their success to the unique mix of independence and support they can offer financial professionals.

"Our vision was to create a partnership with financial advisors in which they can offload all of the time-wasting activities to the Sierra Ridge support staff," Foti said. "This allows them to focus on their practice's most important, revenue-producing tasks."

The Sierra Ridge model goes further than the typical [OSI](#) partnership in the independent financial professional space. Their offering includes administrative support staff, business development, marketing support, and a dedicated investment team with customizable portfolio management.

Another key differentiator for Sierra Ridge is its technology line-up, powered by Atria Wealth Solutions. Last year they rolled out Unio, their new financial professional platform, and Clear1, their client portal, vastly improving the experiences of financial professionals and clients.

Of course, there's more to Sierra Ridge than helpful support staff. They boast a unique culture that prioritizes collaboration, passion, and professional development. In fact, they're planning a three-day retreat in South Lake Tahoe this year to celebrate the firms' four-year anniversary—a chance for the widespread Sierra Ridge team to spend time together.

"We truly have a family culture at Sierra Ridge, and we're excited to see every member of the team and their families at Lake Tahoe," Slaughter said. Looking to the future, Slaughter said they plan to continue strengthening their footholds in California, Oregon, Washington, Idaho and Texas while also expanding their reach to the east. "Having an East Coast presence would be massive for Sierra Ridge," Slaughter said. "Our goal is to be known nationally as a premier partner for independent financial advisors." If Sierra Ridge's current trajectory holds, that milestone may be just around the bend.

ABOUT

Sierra Ridge Wealth Management is a full-service financial firm committed to helping people achieve their financial goals. We provide a fully integrated approach to building and protecting your wealth, including customized portfolio management strategies and asset protection structures. We work with you to reach new heights together.

Securities and investment advisory services are offered through NEXT Financial Group Inc. Member FINRA/SIPC.

Sierra Ridge Wealth Management is not affiliated with NEXT Financial Group, Inc.

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