Sierra Ridge, ClientFirst Strategy, Inc., Add Advisor to East Coast Team

Sierra Ridge Wealth Management, recently announced that advisor Robert "Bobby" Bird joined their Long Island-based ClientFirst Strategy, Inc., team.

Robert Bird, CFP

SACRAMENTO, CA, UNITED STATES, September 12, 2022 /EINPresswire.com/ -- Sacramento – Sierra Ridge Wealth Management (Sierra Ridge), a full-service financial firm based in Sacramento, CA, recently announced that advisor Robert "Bobby" Bird joined their Long Island-based ClientFirst Strategy, Inc., (ClientFirst) team. The hire brings the Sierra Ridge roster of associated advisors to 19.

Bird has more than 20 years of experience working for clients and is passionate about helping families meet their financial goals through gaining a deeper understanding of what truly matters to them. This relatable, authentic approach is what drew Bird to the ClientFirst and Sierra Ridge partnership and away from the wirehouse model.

"I've been in the wirehouse business for the past 15 years, and I can see the industry is shifting to reward agile entrepreneurs who are able to provide their customers with a premium wealth management experience," Bird said. "I'm partnering with Mitch [Goldberg] and the Sierra Ridge team because they have the resources and knowledge to help me give my clients a proactive, authentic and intelligent strategies to meet their financial goals."

Mitch Goldberg, President and CEO of ClientFirst Strategy, Inc, joined Sierra Ridge in June, marking the beginning of their Northeast expansion. Bird, who has known Mitch for years now, said he is excited to collaborate with another experience advisor to propel his practice's growth.

Sierra Ridge Co-Founder James Slaughter said he was excited to see Bird and Goldberg working together in their Northeast footprint.

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> *James Slaughter, President and Co-Founder*

associated with being independent,” Slaughter said. “Bobby is the latest example of the value we and ClientFirst can bring independent advisors and their clients.”

Bird has held the CERTIFIED FINANCIAL PLANNERTM designation since 2008. He also holds the Finra Series 7, 63 and 65 licenses and life and health insurance licenses in several states. Bird graduated from Iona College in New Rochelle, NY, receiving a bachelor’s degree in Business Administration, with an emphasis on finance.

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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