NEWS RELEASE
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Reaching New Heights: A Conversation with Sierra Ridge Co-founder James Slaughter

Sacramento, CA – James Slaughter is the President and Co-founder of Sierra Ridge Wealth Management, a full-service wealth management firm based in Sacramento. Since 2018, he and Co-founder Giancarlo Foti have led a rapidly-growing team of financial advisors, financial planners, wealth strategists and other financial professionals. In 2021 alone, they added four advisors to their roster, and if the past is any indication, the momentum will keep going in 2022. Read on for a brief transcript of an interview with James Slaughter.

Sierra Ridge had incredible growth in 2021. What is driving your success?

James: Well, every year we have been able to grow and partner with amazing independent advisors and 2021 was no different. Independent Advisors choose to partner with us for our support and resources. In the independent channel advisors need to go directly to a broker-dealer for supervision or attach to an OSJ. At Sierra Ridge we have taken the OSJ model and enhanced it by providing transition support, office support, administrative support, portfolio management, marketing support, technical support, and payroll & benefits. We have taken all of the lower dollar revenue generating activities and internalized them. This allows our advisors to focus more of their time on the higher dollar revenue generating activities."

That is outstanding. Tell us a little about the advisors who chose to partner with Sierra Ridge in 2021.

James: The first Advisor to join in 2021 was Jennifer Ewing with Ewing Financial Group. She joined us in January from Waddell & Reed and is based out of Cedar Park, Texas. She actually just got married recently. Jennifer runs a clarity wealth practice for successful women. We are very excited to have her as part of the Sierra Ridge Group. Our next advisor was Tommy Guilfoyle who joined us in May from Merrill Lynch. Tommy is based out of Seattle, WA. He does a great job working with business owners. A few weeks after Tommy joined us, Erik Truxal with Truxal Wealth Management partnered with us. Erik came from Edward Jones and is from the Roseville/Granite Bay area in California. Erik had an extremely successful transition and we are currently working with him to open up a new Roseville office location. We are very excited to grow our Northern, California footprint and hope to have this new location open in early 2022. Our last advisor to join in 2021 was Philip Kong who joined us from US Bancorp Investment. Prior to US Bancorp, he spent quite a few years at Wells Fargo Advisors. Philip joined in September and is wrapping up a very successful transition. I actually just flew out to Sacramento for a client event that Philip hosted. He hosted a pizza making night at the Napoli Culinary Academy. It was an incredible event. All four of these advisors have been great additions to the culture of Sierra Ridge and we are happy to support them.

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That's incredible to have four advisors join your group over the last year. That brings you up to 16 advisors now?

James: That is correct.

It seems like many of your advisors have their own DBA (Doing Business As). Is that correct?

James: About half of our advisors use the Sierra Ridge Wealth Management name. We might actually change that to the Sierra Ridge Advisor Group in 2022. The other half set up their own DBA. It is entirely up to the advisor.

If an advisor wants to set up their own DBA, do you provide any help or assistance?

James: I'm glad you asked that. One of our brand-new resources is a website development team who will work with advisors who want to set up a website with their own DBA and branding complete with IT support.
Our first advisor to utilize this program was Jennifer Ewing and her new site just went live. It looks fantastic.

Website development and ongoing IT support is a huge benefit to advisors. What are you most excited about for the beginning of 2022?

James: For the last six months we have been building out our new Sierra Ridge Wealth Management website. We are getting ready to launch that at the beginning of 2022. It looks amazing and it has incredible functionality. I can't wait to share that with our clients and advisors.

Thanks for taking this time to share a little about the incredibly successful year Sierra Ridge has had.

James: Thank you!

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.

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