

Independent Mitch Goldberg Tapped to Lead Sierra Ridge's Northeast Expansion

New hire solidifies Sierra Ridge as a coast-to-coast enterprise and shines more light on the value of their supported independence model.

NEW YORK, UNITED STATES, June 29, 2022 /EINPresswire.com/ -- [Sierra Ridge Wealth Management](#) (Sierra Ridge), a full-service financial firm, recently welcomed [Mitch Goldberg](#) as the latest addition to its team of advisors. Mitch, located in Long Island, NY, will lead Sierra Ridge's growth in the New York region.

With Goldberg, the Sierra Ridge roster of advisors expands to 18, marking four years of explosive growth for the Sacramento-based firm. Goldberg's hire comes on the heels of Sierra

Ridge's recent announcement that Joseph Bonacci joined the firm as the dedicated portfolio manager, a resource available to all Sierra Ridge advisors.

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Goldberg said. "I'm really looking forward to building a team that can take advantage of the infrastructure and support they provide—the dedicated investment manager, the marketing support, the back-office administrative help, these are all things that are going to help us save time so we can focus on the client."

Goldberg, who will continue operating under ClientFirst Strategy, Inc., has worked in financial services for over

twenty years, 17 of which were with NEXT Financial Group, Inc., a Houston-based broker-dealer and subsidiary of [Atria Wealth Solutions](#), Inc. (Atria).

"He already knows Atria and the Atria platform," said James Slaughter, President and Co-founder



of Sierra Ridge. "He'll be able to help other advisors make the most of Atria's tools and resources on day one."

Frequently featured as a commentator on CNBC and other media outlets, Goldberg also hosts the livestream show "Be the Boss of Your Money" for thousands of followers on LinkedIn, Twitter, YouTube and Facebook.

To Slaughter, Goldberg represents a key partner in securing a foothold in the Northeast, one of the last untapped regions for the firm.

"We believe our small firm feel with big firm resources will resonate with advisors anywhere, and Mitch is going to help us bring that to New York," Slaughter said. "We're really looking to grow the region and Mitch is the first step in making that happen."



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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