SUTTER Wealth Management | WISDOM SERVICE TRUST

(916) 740-1900

“It’s not how much money you make but how much money you keep, how hard it works for you, and how many generations you keep it for” - Robert Kiyosaki

Who We Are

We are a team of skilled professionals who came together around the simple concept that people want unbiased, impartial, and objective advice that provides tools necessary for them to be good stewards of their wealth.

What We Do

We provide comprehensive investment management solutions and financial planning. We collaborate to create strategies that incorporate and streamline the management of your wealth.

Why We're Different

Our firm is structured as an independent Registered Investment Advisor (RIA) which represents a deliberate choice to move away from the environment of traditional brokerage and investment banking

firms. As fiduciaries, we have a duty in how we manage each client’s wealth with the care, skill and

judgement of a professional, avoiding conflicts of interest, disclosing all material facts and controlling investment expenses.

Sutter Wealth Management utilizes a highly personalized wealth management approach which is designed to give clients the confidence to live the way they want to live now, and through each phase of life. We specialize in helping our neighbors, in the Roseville, area with Retirement Planning, Financial Planning, and Estate Planning strategies.

There are always things that happen in life that we cannot control or plan for, we help you prepare for the unplanned as well as the planned. We create an investment and comprehensive financial plan, guiding you through life changes to help keep you from running out of money before you run out of time. A Legacy Plan

is also an important focus so that those that you care about are taken care of along with charities that are close to your heart.

Contact

Sutter Wealth Management

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