

Invest wisely. Rest easy.

Market-leading investment solutions backed by decades of strategic research and analysis. Sierra offers programs that suit the risk tolerance of conservative investors.

OUR STRATEGIES

APPROACH

Our focus is on serving the needs of conservative investors whose primary objective is to preserve capital and achieve a moderate return on their investment.

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“At Sierra, we take the view that we cannot control or manage returns - the stock, bond, currency and commodity markets fluctuate significantly and unpredictably - but we can manage downside risk. And we believe our first priority is to keep our clients out of trouble.”

— David C. Wright, JD

RECENT UPDATES

[Sierra Investment Management again named to the FT 300, Financial Times' List of Top U.S. Investment Advisors](#)

PRESS RELEASE | July 1, 2019 | By [Sierra Investment Management](#)

Sierra was once again named in the Financial Times Top 300 RIA's in the U.S.

[The Stealth Bull Market in Bonds of the Past Year](#)

COMMENTARY | June 19, 2019 | By [Terri Spath](#)

Picking a flavor of ice cream is never an easy decision. The same can be said for bonds. Like ice cream, bonds come in 31 flavors (or so).

[Bloomberg News Online: Fundamentals Remain Intact \(Radio\)](#)

NEWS ARTICLE | May 7, 2019 | By [Sierra Investment Management](#)

Bloomberg News Online (May 7, 2019): CIO Terri Spath reviews leading indicators she keeps watch on that warn of a possible recession ahead.

[MM: Breaking Down Bond Benchmarks](#)

VIDEO | May 3, 2019 | By [Terri Spath](#)

Bond benchmark investing can come along with some unintentional risks.

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Invest with Sierra.

If you are interested in investing with Sierra, please fill out the following information.

Our current separate account minimum is \$1,000,000 per household for new clients
or \$500,000 for adult children of current clients.

[CONTACT US](#)

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