

When you picture your ideal life, what do you see? At Sanderson Wealth Management, we understand the crucial role your wealth plays in bringing your goals into focus. Our integrated, individualized approach not only adds value in the financial sense, but enables you to reach a higher level of achievement and personal satisfaction.

HOW WE MANAGE YOUR WEALTH

Latest insights.

The Donor Advised Fund Revolution

Considering a private foundation for your philanthropic endeavours? There may be a more flexible and efficient option – a donor advised fund. Tim Domino, CPA, CFP®, explains how this charitable planning vehicle works and how it compares to private foundations.

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The Dreaded Inverted Yield Curve

John S. Gullo, CFA, CFP®, CIMA® explains the difference between a normal and inverted yield curve, and discusses whether today's short-term interest rates signal a recession in the near future.

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Video: Foreign Relations, Furloughs, and The Fed – A Look at 2018 and the Future

In this video, John Sanderson, CPA, CIMA®, highlights the key financial issues of 2018 and how they may impact your wealth in the coming year and beyond.

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Investment Review for First Quarter 2019

From the Powel Pivot to Brexit delay to Chinese trade tensions, John Gullo explains the major financial news and trends that transpired during the first quarter of 2019. [Read More >](#)

The Art of a Tax Swap: Advanced Tax Loss Harvesting

Tax loss harvesting is a common strategy in the investment world. At Sanderson, we like to take this approach a step further with what we like to call a tax swap. [Read More >](#)

What Does the Tax Cuts & Jobs Act Mean to Your Philanthropic Planning?

Recent tax reform has significantly increased the standard deduction for individual tax payers, which can impact the tax benefit of charitable giving for many of our clients. In this article, we examine vehicles and strategies for fulfilling your philanthropic goals in a tax-efficient manner. [Read More >](#)

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Our firm.

Since 2001, Sanderson Wealth Management has provided comprehensive financial services exclusively to high-net-worth individuals and families. This focus allows us to provide personalized attention and forward-thinking strategies tailored to your precise needs and objectives. From our headquarters in Buffalo, New York, we work with clients around the country.

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