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WELCOME

Client needs determine the scope of the engagement with Sierra Nevada Wealth Management. With our back office custody and clearing operations managed by Schwab Institutional, we have an open investment platform, with the products and service offerings of an asset manager with over \$1 trillion in client assets. At SNWM, each client's financial situation is assessed and balanced with our best opportunity to add value, net of costs, to your financial profile.

PROFILES

GREGORY E. CRAWFORD, CFP[®]



Mr. Crawford has over a decade of experience managing portfolios and performing securities analysis. In 2002 he was named the top healthcare investment analyst by Health Leaders Magazine. [Click to read more.](#)

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SERVICES



[Wealth Management](#)

Wealth management is the combination of sophisticated investment management with the client's risk assessment and goal-setting process, or financial planning.

[Investment Management](#)

The principals of SNWM have years of experience managing portfolios and investments at the institutional level, using tools and techniques which are often not used by individuals.

[Financial Planning](#)

SNWM evaluates and recommends optimization of resources in the areas of employee benefits utilization, cash flow and debt management, insurance planning, education planning, retirement planning, taxation strategies and estate planning.

[Family Office](#)

SNWM has the expertise to evaluate, execute and manage the sophisticated types of investments available to families with significant assets.