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Sierra Mutual Funds† has developed a disciplined, time-tested investment approach that has produced satisfying long-term risk-adjusted returns for investors.

†Includes predecessor and affiliate organizations. There is no guarantee that any investment strategy will achieve its objectives, generate profits or avoid losses.

"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."

Sierra Tactical

CORE INCOME FUND

A highly diversified mutual fund that is best suited for investors seeking total return with a low risk tolerance.

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MUNICIPAL FUND

A highly diversified mutual fund best suited for conservative investors who seek to preserve capital and provide benefits to high-income investors.

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Meet Our
Leaders

David C. Wright, JD

David C. Wright, JD, is Co-Founder, Managing Director, and Portfolio Manager at Sierra Mutual Funds. He jointly oversees all aspects of the organizations' activities, including

Eichler, Hill Richards, Inc., then the largest investment banking firm west of Chicago, before co-founding Sierra in 1987 with Dr. Kenneth L. Sleeper.

Kenneth L. Sleeper, MBA, PhD

Dr. Kenneth L. Sleeper, MBA, PhD is Co-Founder, Managing Director, and Portfolio Manager at Sierra Mutual Funds. He jointly oversees all aspects of the organizations' activities, including asset management, research, and client relationships. With an extensive background in statistical and computer applications, Ken previously focused on advanced risk management, developing and refining computerized techniques for reducing downside risk, before co-founding Sierra in 1987 with David C. Wright.

Terri Spath, CFA, CFP®

Ms. Terri Spath, CFA, CFP® is Chief Investment Officer & Portfolio Manager at Sierra Mutual Funds. She is responsible for market and economic analysis, portfolio allocation, investment strategy and building client solutions at the firm. Terri previously served as Deputy Chief Investment Officer at Mercer Global Advisors. Her extensive experience in the financial services industry includes portfolio management and analyst responsibilities at Franklin Templeton, Fidelity Investments and RSF Capital Management.

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Wallace Forbes recently spoke with Terri Spath, CIO at Sierra Investment Management, to discuss today's economy and her approach to investing.

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