SIERRA
INVESTMENT MANAGEMENT

Disciplined Risk Management

Ways We Can Help

1 **A Focus On Limiting Drawdowns**
While we can't control the markets, we seek to manage the risk of drawdowns through a tactical, rules-based investment process.

2 **Tax Efficient Investing**
We provide tax efficient investment programs that can help minimize income taxes.

3 **Provide Investment Counsel During Important Life Events**
We provide counsel on investments with the goal of helping you through life's significant events such as the sale of a business or property, divorce or the loss of a spouse.

4 **Personalized Cash Flow Analysis**
A rigorous analysis of your finances, considering income, expenses, assets, and liabilities, to create a personalized cash flow plan tailored to you.

5 **Access to a Distinctive Tax-Deferred Account Designed for Investors Who Have Surpassed the Eligibility for IRA Contributions**
Qualified Accredited investors can use a PPVA as an investment option that doesn't mandate Required Minimum Distributions (RMDs) until age 90 or older.

6 **Simple and Tax-advantageous Way to Give to Your Cherished Charities**
We facilitate, set up and manage investment accounts for charitable giving.

7 **Personalized Client Service**
Personalized Client Services so that you are speaking with a staff member who knows you when you call.

Call us at 310.452.1887 or email us at:

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