



Propel Your Success

Sandhill Investment Management
Firm Overview & Strategy

sandhill-im.com

Who We Are

Founded in 2004 by a small team of research professionals, Sandhill has become a premier wealth management partner for clients in Western New York and beyond. Operating as an independent Registered Investment Advisor (RIA) registered with the SEC, we oversee more than \$2B in assets across 42 states. Our job is to help you navigate the world of personal finance and lay the groundwork for a lifetime of success.

Since our inception in 2004, a deep-rooted passion for research has been our defining strength. By taking a prudent, detailed approach to the investment process, Sandhill identifies opportunities that offer the greatest combination of value and quality.

Our Values

Integrity

Taking accountability by following through on our promises to earn your trust, exceed your expectations, and put you first.

Prudence

Performing in-depth research to make sound investment decisions tailored to your specific financial circumstances.

Service

Maintaining consistent and ongoing contact with you—all while being responsive to your every need.

Communication

Creating clarity around our investment process to ensure you are well-informed of—and kept up-to-date with—our actions.

Honesty

Providing you with sheer transparency regarding account performance, investment decisions, and fee structure.

Excellence

Training best-in-class employees who understand the importance of delivering an exceptional experience to you.

Why Sandhill?

Unique Design

Not all investment managers are the same. At Sandhill, we take an in-house approach to asset management—thereby avoiding costly external mutual fund managers. Led by a team of seasoned Research Analysts, we carefully select and actively manage your portfolio of individual securities. This approach provides you with full transparency into where your capital is invested and allows for customized, tax-efficient portfolio management. Rather than mimicking an index, we invest your capital in well-researched businesses that we believe possess stronger growth potential.

Client-First Focus

Our employees are held to a fiduciary standard of care—meaning we are legally obligated to act and make decisions in your best interest, not our own. As a Registered Investment Advisor, we do not earn sales commissions by selling certain financial or investment products; instead, our success is solely based on your portfolio growth. In our eyes, this is the most fair and ethical way we can operate.

Longevity of Success

Over the past two decades, Sandhill has emerged as a nationally recognized investment firm—and our commitment to achieving the unique goals of our clients has contributed to our rise to prominence. Our team of financial analysts, planning professionals, and accountants possesses the skill, experience, and track record necessary to ensure your money is sustained for generations to come.

From Buffalo, For Buffalo

Despite our nationwide reach, we have always remained local in execution. Sandhill's research, advisory, and operations teams are all headquartered in the heart of the Queen City. Contributing to Buffalo's economic renaissance matters to us—and we understand the importance of working with our local community to establish brighter futures for all.

About Me

Born and raised in Buffalo, I have always been fascinated by financial markets and how they can best serve us and our loved ones. With two decades of highly specialized experience in both equity and fixed income markets, I focus on providing custom portfolios and advisory services tailored to meet the needs of you and your family. Simplifying the complexities of financial management for my clients while providing a superior, transparent investment framework is at the core of my work.

Areas of Expertise: Portfolio construction and management, fixed income portfolio management, tax-efficient investment strategies, comprehensive financial and retirement planning.

Education: MBA, Canisius College; B.S. Accounting, University at Buffalo

Years of Experience: 20

Board Membership & Civic Involvement: TKIG Investment Fund at the University at Buffalo, FeedMore WNY, BestSelf WNY

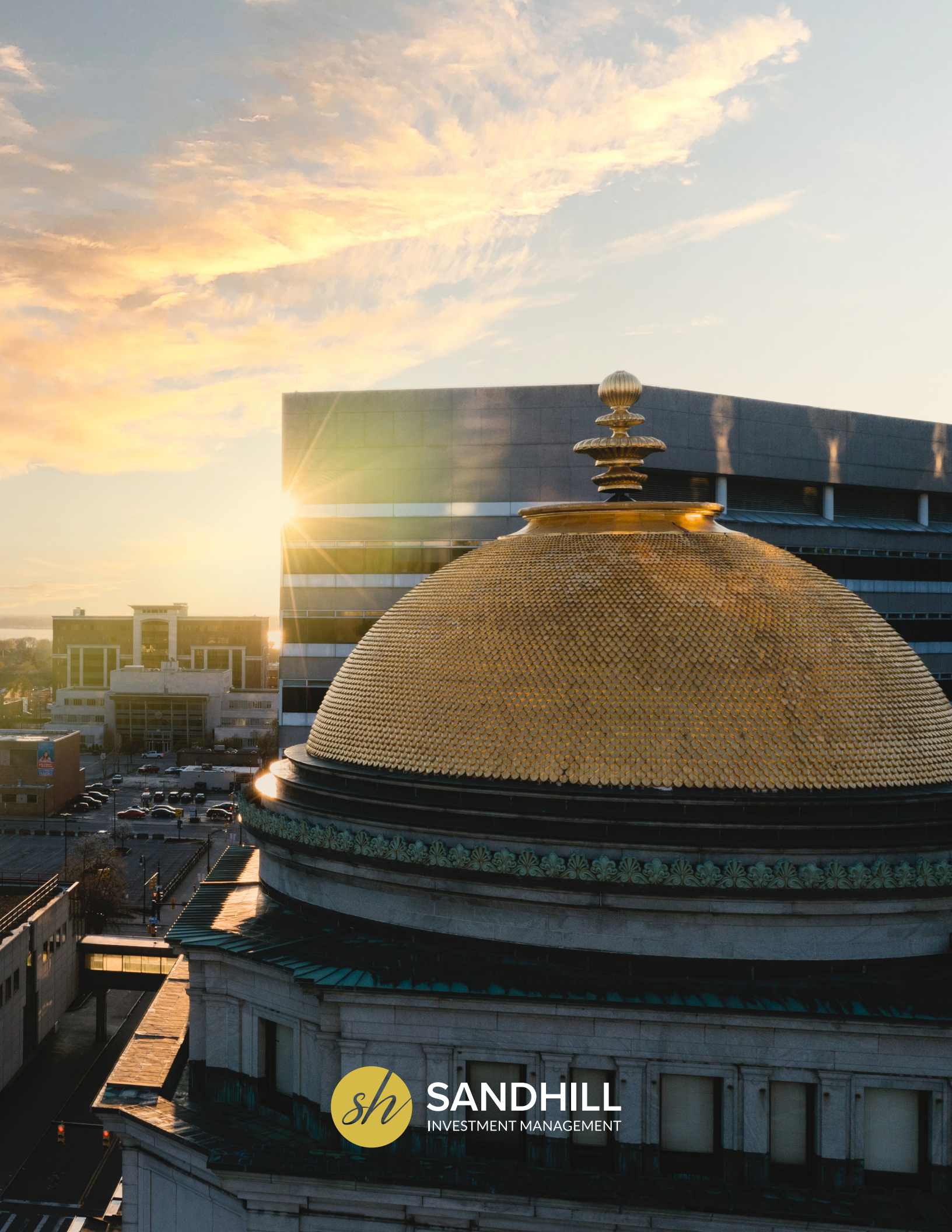


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