Invest In You

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.

What We Do

Maximize Your Financial Growth

Minimize Your Potential Risks

Protect Your Hard-Earned Capital

Offer You Greater Peace of Mind

How We Do It

At Sandhill, our team of experts provides discerning financial advice that blends holistic planning with customized investment management. By catering our private wealth services to rising young professionals like you, we can build a solid foundation for your financial future while helping you withstand any curveballs that life throws your way.

- Comprehensive Financial Planning
- Optimizing Portfolio Construction
- Contributing to Retirement Plans
- Analyzing Potential 401(k) Rollovers
- Managing Cash Flows
- Building an Emergency Fund
- Enhancing Your Financial Knowledge
- Saving for Future Milestones
- Solving Student Loan Debt
- Planning for Children's Education
- Guidance on Alternative Investments
- Developing Strong Financial Habits

Why Sandhill?

Thinking Big Picture: Putting together a prudent financial strategy must encapsulate all elements of your life: your needs, your wants, and your dreams. But rather than pulling from a prefabricated playbook, your approach should be uniquely customized to align with your own personal situation. Whether it be saving for a dream home, sending your children to college, or planning for a comfortable retirement, Sandhill can offer the individualized financial guidance you need to attain your goals.

Growing with You: As your life progresses and your circumstances change, so too must your financial blueprint. Our team understands the importance of periodically revisiting your risk tolerance, investment allocation, and long-term goals to ensure they are properly aligned with your evolving needs. We want to help you comprehensively prepare for all that lies ahead as you look to turn your aspirations into reality.

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.

My Story

Throughout my life, I have always believed in the power of helping others. As I spent time enhancing my financial knowledge through college and into my adult life, I realized that hardworking people like you deserve to work with a trusted partner who will keep you on track to reach your personal milestones and achieve long-term success.

My desire to work with other young professionals in building their wealth and shaping their financial futures led me toward a career as an investment advisor. Your aspirations are important—and I want to help you fulfill them by establishing a plan that balances both your money and your life. Working together, I hope to empower you to better understand—and feel confident in—your financial journey.

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