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Company Backgrounder

Sherwood Financial Partners is a boutique, multifamily office-style advisory firm serving high-net-worth individuals and families, primarily in California and Colorado.

The firm was built on a belief that financial decisions are rarely just about money.

They are often tied to family, identity, responsibility, opportunity, and sometimes fear. Retirement, inheritance, charitable giving, caring for aging parents, preparing children for wealth, and navigating loss all carry financial implications, but they also carry emotional weight.

Sherwood helps clients navigate those decisions with clarity and confidence.

Attention as an investment

At Sherwood, attention is viewed as one of the most valuable assets an advisor can offer.

The firm's work begins by understanding the full context of a client's life, not only their balance sheet, but also their family relationships, goals, concerns, responsibilities, and priorities.

The belief is simple: attention compounds.

When attention is invested consistently and thoughtfully, relationships deepen, decisions improve, and important details are less likely to be overlooked.

That philosophy informs every aspect of the firm's work, from day-to-day planning decisions to major life transitions.

Living Legacy Planning

At the center of Sherwood's approach is a philosophy known as Living Legacy Planning.

Traditional legacy planning often focuses on what happens after someone dies, such as estate documents, trusts, tax considerations, and the transfer of assets.

Sherwood believes legacy begins much earlier.

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Living Legacy Planning encourages clients to think about how their wealth can support the people, values, experiences, and causes that matter most while they are still living.

The conversations often extend beyond financial planning to include family dynamics, charitable giving, preparing heirs, stewardship, and the responsibilities that come with wealth.

The goal is not simply to transfer assets efficiently. It is to help clients use their resources intentionally throughout their lives.

An integrated approach

Many affluent families rely on multiple professionals for financial, tax, legal, and estate planning guidance. Those relationships often operate independently, leaving clients to connect the dots themselves.

Sherwood takes an integrated approach.

Financial planning, tax expertise, estate planning coordination, and investment management work together to help clients make informed decisions with a clear understanding of how one choice may affect another.

The focus is less on producing a plan and more on helping clients navigate decisions as life evolves.

Who Sherwood serves

Sherwood primarily serves high-net-worth individuals and families with more than $1 million in liquid assets.

Many clients are navigating significant life transitions, including:

- Retirement
- Inheritance
- Family wealth transfer
- Estate planning decisions
- Business transitions
- Charitable giving
- Loss of a spouse or loved one
- Multi-generational planning

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The firm often works with families seeking guidance not only on financial decisions, but also on the real-life relationships and responsibilities that accompany them.

Values

Sherwood's work is guided by four core values:

Attention over distraction
The people behind the numbers matter as much as the numbers themselves.

Clarity over complexity
Financial advice should simplify decisions, not complicate them.

Depth over volume
The firm chooses fewer, deeper relationships in order to invest time and attention where it matters most.

Care with conviction
Empathy and honesty are equally important, especially when decisions are difficult.

Looking ahead

Sherwood's vision is a future where attention is invested consistently and connection, clarity, and confidence compound.

The firm's work continues to center on helping clients make thoughtful decisions, navigate change, and use their wealth in ways that reflect what matters most to them.

Media resources

Executive bios, company information, media-ready headshots, brand assets, and additional resources are available at:

sherwoodfp.com/media

Media contact

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