SHERWOOD
FINANCIAL PARTNERS

Fact Sheet

Firm type

Boutique, multifamily office–style advisory firm

Who we serve

High-net-worth individuals and families with $1M+ in liquid assets, primarily in California and Colorado.

Offices

Westlake Village, California (headquarters)
Boulder, Colorado

Core positioning

Sherwood invests in attention — not just in portfolios or plans, but in the people, stories, families, feelings, and futures behind the numbers.

Mission

To bring clarity and calm to complex financial lives so clients can move ahead with confidence and conviction.

Brand promise

Known personally. Guided steadily.

Signature philosophy

Living Legacy Planning

Helping clients align their wealth with the life they want to live and the legacy they want to create.

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Areas of expertise

- Retirement transitions
- Legacy planning
- Family wealth transfer
- Estate planning coordination
- Charitable giving
- Multi-generational wealth planning
- Financial planning during major life transitions

What makes Sherwood different

Sherwood works from real data, stays closely engaged through everyday decisions and major life transitions, and brings financial planning, in-house tax expertise, and estate coordination together as one integrated advisory team.

Values

- Attention over distraction
- Clarity over complexity
- Depth over volume
- Care with conviction

Media resources

Access executive bios, company background information, media-ready headshots, brand assets, and additional resources at:

sherwoodfp.com/media

Media contact

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