



Sherman

WEALTH MANAGEMENT

Life is Complicated; Your Finances Don't Have To Be



Who We Are

Welcome To Sherman Wealth, a fee-only, fiduciary registered investment advisor located in Gaithersburg, Maryland serving those in the D.C. Metropolitan Area and clients across the country. We are here to personalize solutions to simplify your financial life!

We are a fiduciary to our clients, but we are also, in some respects, a concierge and a coach. What we mean is that we work with you in an all-encompassing way – ensuring your specific needs are being heard, understood and proactively addressed.



How To Get Started

Start by scheduling a complimentary 30-minute consultation [here](#) to review your needs and financial situation. This is your first step in securing the financial future you've always dreamed about!

Email us at Info@shermanwealth.com or call/text (240) 428-1622 with questions or inquiries.



How We Can Help YOU

Our services are are customized to meet your specific needs.

We can help you with the following:

- Goal Setting
- Cash Flow Analysis & Budget Planning
- Net Worth Analysis
- Debt Strategy
- Student Loan Planning
- Retirement Planning/Projections
- Work Benefits
- Rent Vs. Buy Mortgage Strategy
- Education Planning
- Portfolio & Investment Analysis
- Investment Management
- Tax Planning
- Insurance Needs Analysis
- Multiple One-on-One Check-Ins Per Year

****PRICE IS BASED ON THE DURATION OF OUR ENGAGEMENT & COMPLEXITY OF YOUR FINANCIAL SITUATION & NEEDS ****

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