



SILVERLEAF™
WEALTH MANAGEMENT

Josh Swanson is a 2001 graduate of the Michael F. Price College of Business at the University of Oklahoma. Following an eighteen-year career, twelve of which were managing institutional assets at The Baker Group, he joined Silverleaf Wealth Management in 2025. Josh brings a service-focused approach to Silverleaf Wealth Management.

Established in 2015, Silverleaf Wealth Management has been client-focused and dedicated to providing excellence in professional wealth management. Still locally owned and fully independent, we have continued our vision to assist families in the areas of wealth management, tax planning, estate planning, financial planning, and business succession.

We provide differentiated opportunities for high-net-worth families by offering access to wealth management services and investment opportunities that historically have been available only to institutions and endowments.

Since the firm began, our mission has been to help families pursue the next level of financial success. We have built a structure and a team that seeks to accomplish this mission and helps people see the options and potential opportunities they never knew were available.

We welcome the opportunity to tell you more about what we have built at Silverleaf Wealth Management at our home office in Omaha and our new office in Texas. Please contact us via the information provided below with any questions or comments.

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THE ART OF INVESTED RELATIONSHIPS

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[†]Achievement is based on annual production among LPL Advisors only.