



REFERRAL LIST

We give our utmost attention to all of our clients, so we only take clients when we can be sure we can uphold this. If we are not able to work together at this time, this list of advisors and firms shares our core values and we are proud to recommend them.

ADVISORS

GABE ANDERSON	<i>Crafted Wealth Management</i>
KATHRYN KUBIAK-RIZZONE	<i>About Time Financial Planning</i>
LEWIS WEIL	<i>Money Positive</i>
LINDA BENTLEY GILLESPIE	<i>Real World Financial Planning</i>
RYAN FRAILICH	<i>Deliberate Finances</i>
TYLER LANDES	<i>Tandem Financial Guidance</i>
VICTOR “Chaim” SCHRAMM	<i>Chaim Investment Advisors</i>

FINANCIAL COACHES

CAROLEEN VERLY	<i>Untangle Your Money</i>
KIMBERLY Z. RAND	<i>Dragonfly Financial Solutions</i>
SARAH DELUCA	<i>Move Money Shift Power</i>
SARAH ROLLER	<i>Sarah Roller Financial Coaching</i>



REFERRAL LIST

NATIONAL NETWORKS

These national networks offer listings of qualified advisors, planners, and coaches

**ASSOCIATION FOR FINANCIAL COUNSELING + PLANNING EDUCATION
(AFCPE)**

GARRETT PLANNING NETWORK

NATIONAL ASSOCIATION OF PERSONAL FINANCE ADVISORS (NAPFA)

ONYX ADVISOR NETWORK

XY PLANNING NETWORK

Saltbox Financial hasn't performed any due diligence regarding these (or any) providers. This list is neither an endorsement nor a recommendation. We recommend that prospective clients consider these in the context of other options and perform their own due diligence.