



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

TYLER LANDES	<i>Tandem Financial Guidance</i>	Website →
GABE ANDERSON	<i>Crafted Wealth Management</i>	Website →
RIVER NICE	<i>Be Intentional Financial</i>	Website →
LANDON TAN	<i>Query Capital</i>	Website →
LINDA BENTLEY GILLESPIE	<i>Real World Financial Planning</i>	Website →
ALI BURKE	<i>Focus Financial</i>	Website →
SUNIL HARPALANI	<i>Holistic View Financial</i>	Website →
LEWIS WEIL	<i>Money Positive</i>	Website →
VICTOR “Chaim” SCHRAMM	<i>Chaim Investment Advisors</i>	Website →

FINANCIAL COACHES

CAROLEEN VERLY	<i>Untangle Your Money</i>	Website →
SARAH ROLLER	<i>Sarah Roller Financial Coaching</i>	Website →
CONOON KIM	<i>Purple Budget</i>	Website →
KIMBERLY Z. RAND	<i>Dragonfly Financial Solutions</i>	Website →

FINANCIAL THERAPIST

DASHA TCHERNIAKOVSKAIA	Licensed Mental Health Counselor	Website →
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REFERRAL LIST

NATIONAL NETWORKS

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

XY PLANNING NETWORK

Website →

GARRETT PLANNING NETWORK

Website →

**NATIONAL ASSOCIATION OF
PERSONAL FINANCE ADVISORS (NAPFA)**

Website →

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

Website →

ONYX ADVISOR NETWORK

Website →

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.