



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

JAY ABOLOFIA	<i>Lyon Financial Planning</i>	Website →
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GABE ANDERSON	<i>Crafted Wealth Management</i>	Website →
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LINDA BENTLEY GILLESPIE	<i>Real World Financial Planning</i>	Website →
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ALI BURKE	<i>Focus Financial</i>	Website →
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SUNIL HARPALANI	<i>Holistic View Financial</i>	Website →
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TYLER LANDES	<i>Tandem Financial Guidance</i>	Website →
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LEWIS WEIL	<i>Money Positive</i>	Website →
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LAURYN WILLIAMS	<i>Worth Winning</i>	Website →
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FINANCIAL COACHES

CONOON KIM	<i>Purple Budget</i>	Website →
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RIVER NICE	<i>Be Intentional Financial</i>	Website →
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KIMBERLY Z. RAND	<i>Dragonfly Financial Solutions</i>	Website →
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JILL TALLEY	<i>Start Financial Fitness</i>	Website →
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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](#) →