Flat-Fee Financial Planner Referral List

This resource lists planners who are fee-only (no commissions) and flat-fee (price based on service provided, not portfolio size). They also focus on serving those in the accumulation stage and provide holistic planning as a core offering.

Erik Baskin, MBA – Baskin Financial
Ideal Client: Military, veterans, and young to mid-career professionals
Services: Hourly, project-based, or ongoing financial planning w/ optional investment management
Contact: erik@baskinfp.com

Corey Beal, CFP® - Empowering Finance
Ideal Client: Badass humans in their pre-retirement years, with a focus on women and the LGBTQIA+ community
Services: Hourly or ongoing planning with investment management
Contact: corey@empoweringfinance.com

Devin Faddoul, CFP® – Adda Financial
Ideal Client: Millennials seeking flat-fee money management
Services: Ongoing planning, optional investment management
Contact: devin@addafinancial.com

Bill Hines, AFC – Emancipare Investment Advisors
Ideal Client: Those seeking financial independence / early retirement and pre-retirees
Services: Life/Retirement/FIRE Plan, total financial makeover, investment management
Contact: bill@emancipare.com

Travis Hughes, AAMS, EA and Eddie Liang, CFP® – Downshift Financial
Ideal Client: Those seeking financial independence / early retirement
Services: Ongoing planning, optional investment management
Contact: info@downshiftfinancial.com

Kevin Lao, CFP® – Imagine Financial Security
Ideal Client: Blended families in the wealth accumulation stage
Services: Ongoing or project-based planning, optional investment management
Contact: kevin@imaginefinancialsecurity.com

Evon Mendrin, CFP®, CSLP – Optometry Wealth Advisors
Ideal Client: Optometrists
Services: Ongoing or project-based planning with investment management
Preferred Contact: evon@optometrywealth.com

Allen Mueller, CFA, MBA – 7 Saturdays Financial
Ideal Client: Busy professionals who want to achieve early financial independence / work optional
Services: Hourly, project-based, or ongoing financial planning w/ optional investment management
Preferred Contact: allen@7saturdaysfinancial.com

Matt Pruitt, CFP®, CFA – Exhale Wealth Management
Ideal Client: Tech professionals with equity compensation
Services: Ongoing planning with investment management
Preferred Contact: matt.pruitt@exhalewealth.com

Chris Randall, CFP® candidate – Axis Capital Management
Ideal Client: Millenials, small business owners, and first time investors
Services: Financial planning with investment management included, help with all money matters
Preferred Contact: chrisrandall@axiscapmanagement.com

Michael Reynolds, CFP®, CSRIC®, AIF®, CFT-I™ – Elevation Financial
Ideal Client: Professionals and families under age 50, SRI/ESG focus, small business owners
Services: Ongoing planning with investment management
Preferred Contact: michael@elevationfinancial.com

Igor Smolyanskiy, CFA, CFP® – Vilga Financial Planning
Ideal Client: Established financial services and tech professionals
Services: Project-based or ongoing planning, optional investment management
Preferred Contact: igor@vilga.com

John Stoj – Verbatim Financial
Ideal Client: Mid to late-career professionals
Services: Project-based or ongoing planning with investment management
Preferred Contact: john.stoj@verbatimfinancial.com

Brittany Wolff, CFP®, AAMS® – Wolff Financial
Ideal Client: Millennial women and couples
Services: Ongoing planning, optional investment management
Preferred Contact: brittany@wolff-finance.com