Advice-Only Financial Planning Referral List

No Options for Investment Management

Disclaimer: Cody Garrett, CFP® and Measure Twice Financial LLC (MTF) are not professionally affiliated with and do not receive any forms of compensation from the listed advisers. MTF cannot guarantee these adviser details are updated to reflect changes in services, processes, or fees.

Regulatory adviser registrations, brochures, and disclosures are available at www.adviserinfo.sec.gov.

Ginger Ames, CFP®, CDAA, EA – Whisper Financial

About: Helps fellow creatives express their creativity without financial limitations, with a specialty in self-employment, cryptocurrency, and tax planning
Service Model: Ongoing or project-based planning
Preferred Contact: WhisperFinancial.sh/lets-chat, Ginger@WhisperFinancial.sh

Lori Bodenhamer – Abundo Wealth

About: Brings high-quality, conflict-free, comprehensive financial planning to everyone
Service Model: Ongoing planning
Preferred Contact: AbundoWealth.com, Lori@AbundoWealth.com

Kevin Burkle, CFP®, CSLP® – HCP Wealth Planning

About: Serves young professionals motivated to achieve financial independence and retire early
Service Model: Project-based planning
Preferred Contact: HCPWealth.com

Ronnie Colvin, CFP® – French Press Financial Services

About: Serves W-2 employees working for tech companies, including equity compensation
Service Model: Ongoing or hourly planning
Preferred Contact: FrenchPressFinance.com, Ronnie@FrenchPressFinance.com

Andrew Dressel, CFP®, APMA®, CRPC® – Abundo Wealth

About: Brings high-quality, conflict-free, comprehensive financial planning to everyone
Service Model: Ongoing planning
Preferred Contact: AbundoWealth.com, Andrew@AbundoWealth.com

Frank Garcia, CFA, CFP®, AIF® – Frankly Finances

About: Focused on educating and empowering investors to be their own best advocate
Service Model: Ongoing or project-based investment review
Preferred Contact: FranklyFinances.com, Frank@FranklyFinances.com

Tyler Hackenberg, CFP®, EA – Drexel Day Financial

About: Serves Catholic individuals and families with financial planning from a faith-based, non-judgmental perspective
Service Model: Project-based or ongoing planning
Preferred Contact: DrexelDayFinancial.com/contact/

Jon Luskin, CFP® – JonLuskin.com

About: Serves self-motivated DIY investors who are open to low-cost index fund investing
Service Model: Project-based then hourly planning
Preferred Contact: JonLuskin.com/portfolio-2nd-opinion

Lindsay Martinez, CFP® – Xennial Planning

About: Makes retirement and financial planning accessible to all young, professional Millennial and Gen X women
Service Model: Ongoing, project-based, and hourly planning
Preferred Contact: XennialPlanning.com, Lindsay@XennialPlanning.com

Danielle Miura, CFP® – Spark Financials

About: Serves young professionals and families
Service Model: Project-based or ongoing planning
Preferred Contact: www.Spark-Fin.com/contact-us-1, Dm@Spark-Fin.com

Sean Mullaney, CPA – Mullaney Financial & Tax

About: 90-day detailed financial planning process for tax-focused DIY investors, with two re-engagement options, including a revised financial plan or a 4th-quarter tax service
Service Model: Project-based planning
States Excluded: Louisiana and Utah
Preferred Contact: MullaneyFinancial.com/become-a-client, Sean@MullaneyFinancial.com

Dave Pedersen – Hermosa Advisors

About: Helps smart, time-stressed professionals (typically 40+ years old) navigate the complicated years with comprehensive financial planning
Service Model: Project-based or hourly planning
Preferred Contact: Dave@HermosaAdvisors.com

Alicia Rose Reiss, CFP® – The Business of Your Life

About: Provides comprehensive financial planning for women and young families (20s-40s) in the accumulation phase
Service Model: Project-based planning
Preferred Contact: Alicia@BusinessOfYourLife.com

Zechariah Schaefer – Ascent Personal Finance

About: Serves Gen Z and Millennial crypto investors (usually employed in STEM/Healthcare) to help them manage their money intentionally, invest wisely, and save on taxes
Service Model: Hourly, project-based, or ongoing planning
Preferred Contact: AscentPersonalFinance.com, LinkinIn.com/in/Zechariah-Schaefer, (609) 772-5665

Jorge Soriano, CFP®, EA – Financial Optimist

About: Serves motivated professionals and mission-driven couples to build solid relationships with their money and create planning strategies designed to grow wealth
Service Model: Ongoing or hourly planning
Preferred Contact: FinancialOptimist.com/contact

Jay Zigmont, PhD, CFP® – Childfree Wealth

About: Provides life and financial planning to childfree people
Service Model: Ongoing or hourly planning
Preferred Contact: ChildfreeWealth.com