

HESPERIAN *Wealth*

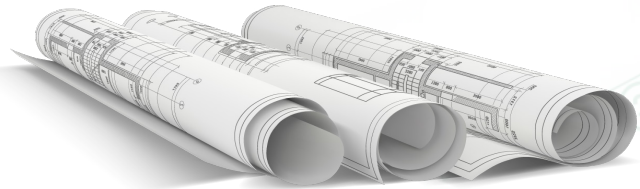
A Blueprint for Your Financial Future

As your wealth manager, we can help you lay out your dreams for the future and draft the plan to make them come true.

How Hesperian Can Help

Hesperian Wealth is an independent, fee-only wealth manager based in Folsom, CA, serving the Greater Sacramento area and the nation virtually. We provide comprehensive financial planning and investment management. We specialize in the unique planning needs of working professionals, young families, and small business owners.

Managing your finances can be overwhelming. But you don't have to go it alone. By outsourcing to us, you get that "second opinion" on life's most important decisions. And you can reclaim time to enjoy the way you want. Sleep better at night knowing Hesperian Wealth has your back and your finances are taken care of.



Learn More

We offer a free, no-obligation Discovery Meeting. This is the time for us to get to know each other and discuss our planning process in more detail. We invite you to book one using the link below when you're ready:

[SCHEDULE](#)

About Eric

Hi, I'm Eric Figueroa, CFP®, founder of Hesperian Wealth. My personal mission is to democratize access to great financial advice and sophisticated investment options. No matter what stage of life you're in or how much you have to invest, I can empower you to take control of your financial destiny. And I can show you how to invest in a personal way to increase your positive impact on the world or align your portfolio with your values.

[More about me >](#)



Credentials



I am a CERTIFIED FINANCIAL PLANNER™, or CFP®, a designation that certifies I have met rigorous education, experience, and examination requirements and have made a commitment to CFP Board's code of ethics. [Learn more here >](#)

Experience

Before starting Hesperian, I worked for a large wealth management firm where I served under their team of advisors and also managed their professional investment research service.

For a complete résumé, view my LinkedIn Profile:



[Review my Advisor Registration >](#)

Education

- Executive Certificate in Financial Planning
Santa Clara University (2018)
- Masters in International Business
Université de Nice–Sophia Antipolis (2013)
- Masters in Business Administration
San Francisco State University (2012)
- Graduate Degree in Business Administration
Université de Nice–Sophia Antipolis (2011)
- Bachelor of Arts in Cinema
San Francisco State University (2008)

Affiliations & Memberships



Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with plaque design) logo in the United States, which it authorizes use of by individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Our Planning Process

We start with deeply understanding you and your dreams for the future. Then through a series of workshops, we draft a detailed blueprint to make that future a reality.

Ultimately, we develop an initial plan that covers every facet of your financial life.

But our work is never done. Each quarter we'll work on Action Items together as we execute your plan. If your goals change or you experience a major life event, we'll be there to help you through whatever life throws at you.

[Click here for more details >](#)



Be Impactful

Want to invest while making a positive impact?
Or in ways aligned with your values or faith?
Let's build you a personalized portfolio.

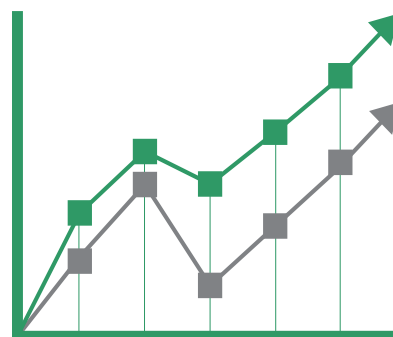
And we want to make a difference along with you:
In addition to providing pro bono planning to
underserved members of our community,
we donate 10% of our investment management
fees to charitable organizations making a difference.

[Learn more about impact >](#)

Winning By Not Losing

You deserve an advisor that earns their fee by seeking to protect against the big risks that can slow or stop the compounding of your wealth. We believe our in-depth research can lead to better results.

[Learn more about our investment approach >](#)



Services

Financial Planning

At the start of an engagement, we work with you to develop a complete Initial Financial Plan. [You can download a Sample Financial Plan here >](#)

Once we deliver your Initial Plan, your Ongoing Planning Subscription begins. Each quarter, we monitor your progress and help you implement Action Items from your plan. We'll also help you update your plan when you face a major life event or your advice needs change.

Planning fees are based on the complexity of your financial situation. You can estimate your fee with the calculator on our [Services & Fees page](#).

Investment Management

We charge a separate asset-based fee of 1% or lower to implement your personalized tactical investment and asset location strategy and manage your investment accounts. However, we don't charge on the first \$50,000 in assets. And there is no investment minimum to work with us.

Have questions? [Visit the FAQ page of our website](#)

or

Contact Us:

eric@hesperianwealth.com

(916) 546-5203

www.hesperianwealth.com

[Find a Time to Meet](#)

Mailing Address

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