HESPERIAN *Wealth*

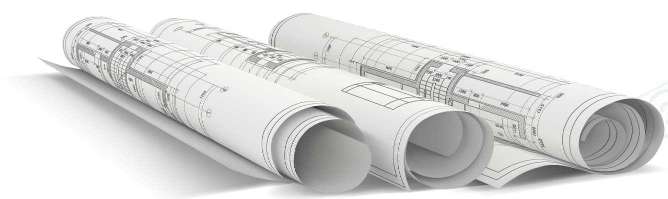
A Blueprint for Your Financial Future

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 services. And 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 to introduce you to our planning process and investment philosophy. We invite you to book one using the link below:

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. I find my work is at its most rewarding when I can bring a consequential planning idea to the table or help a client avoid a costly mistake. I want to use my financial planning knowledge to make a direct positive impact on your life.

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

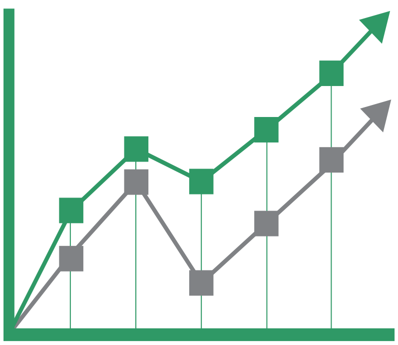
Our Planning Process

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 ›



Winning By Not Losing

With our investment process, we seek 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 ›

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 ›

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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