

HESPERIAN *Wealth*

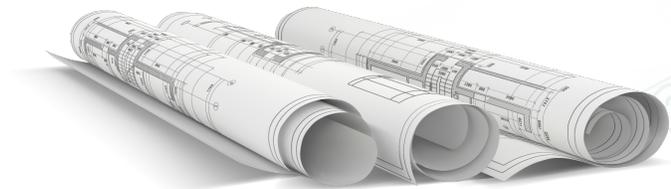
A Blueprint for Your Financial Future

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 education planning and the needs of working professionals, public sector employees, small business owners, and retirees.

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®, CCFC, 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®, 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 ›](#)



I am also a Certified College Financial Consultant (CCFC), a designation granted to individuals who have demonstrated mastery in the topics of education funding, financial aid planning, planning with education tax deductions and credits, and student loan advising. [Learn more here ›](#)

Experience & Education

- Over 12 years in the finance industry
- CERTIFIED FINANCIAL PLANNER® since 2019

For a complete résumé, view my LinkedIn Profile:



[Review my Advisor Registration here ›](#)

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.

My Planning Process

I start with deeply understanding you and your dreams for the future. Then through a series of workshops, we draft a detailed blueprint together 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, I'll be there to help you through whatever life throws at you.

[Click here for more details >](#)



Winning By Not Losing

With my investment process, I seek to protect against the big risks that can slow or stop the compounding of your wealth. I believe my in-depth research can lead to better results.

[Learn more about my 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 I want to make a difference along with you: In addition to providing pro bono planning to underserved members of our community, I donate 10% of my investment management fees to charitable organizations making a difference.

[Learn more about impact >](#)



Services

Comprehensive Financial Planning

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

Once I deliver your Initial Plan, your Ongoing Planning Subscription begins. Each quarter, I monitor your progress and help you implement Action Items from your plan. I'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 and may be discounted or waived completely if you also elect our Investment Management service. You can estimate your fee with the calculator on my [Services & Fees page](#).

Investment Management

I 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.

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

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