

STATHERÓS

FINANCIAL SOLUTIONS

OUR VISION

at **Statherós Financial Solutions** is to liberate our clients from financial concern. We do this through a passion around our mission.

OUR MISSION

is to guide individuals and businesses through intentional planning with an unwavering commitment to education, principles and relationship so that they may live with purpose.

Whether you are new to investing, approaching retirement, or the owner of a company, we take the time to discover your goals and develop the appropriate strategies to help you achieve them. At Statherós, we make your goals and purpose **our mission**.

With Statherós Financial Solutions, you will never have to walk the road alone. If you're a plan sponsor or business owner, we'll guide you. If you're an individual, we'll help make sure you are prepared for every financial hurdle, every life transition so that you may enjoy every success.

We plan so that *you live* with intent.

WHO WE HELP

Individuals & Families

We provide custom financial planning and investment management to help see you through all the phases of your financial life changes.

Businesses & Organizations

We deliver retirement plan fiduciary advice for businesses and their employees through on-site education, investment management and monitoring, and strategic expertise.



We plan. *You live.*



HOW WE HELP

Individuals & Families

We believe that financial planning and investment management should not be limited to the sum of your assets, but rather should incorporate the quality of your life. Under the guidance of our Certified Financial Planners (CFP™), our holistic approach, and use of the latest technology, together we seek to create a plan that will work for you, personally. As your fiduciary and “fee only” planner, *your best interest is our duty.*

- | Personalized meetings to understand your goals
- | Scenario modeling and implementation
- | Financial planning and risk mitigation
- | Advisor/Client portal to track and view all assets
- | Investment monitoring and management
- | Annual reviews

Businesses & Organizations

As your retirement plan advisor, we go above and beyond the call of duty to provide excellent service and care to our clients. For plan sponsors and plan participants, Statherós Financial Solutions will be there to answer any and all questions that may arise.

- | Vendor liaison/review or RFP services
- | Co-fiduciary liability
- | Cost benchmarking for 401(k) and 403(b) plans
- | On-site participant education & engagement
- | Group enrollment/education meetings
- | One-to-one participant investment advice
- | Investment monitoring & management
- | Fiduciary training & oversight
- | Trustee reviews

LET'S TALK

1101 Investment Blvd. Suite 125, El Dorado Hills, CA 95762
916.932.1219

2107 North First St. Suite 415, San Jose, CA 95131
408.871.1590

StatherosFinancial.com

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