



Your Financial Journey Starts with You

And you are exactly right. Your financial nature is the key to greater wealth & health.



Recent News



Holistic Financial Planning the shepard FINANCIAL Way

Many wealth management firms are embracing holistic financial planning which is a trend based on improved client relationships and a more client-centered approach to planning & wealth management. This is good news! It's meant to better serve individual clients and...

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Retirement Planning vs. Life Planning

People do not retire. They are retired by others. ~Duke Ellington
Retirement is usually held up as something we all must prepare, plan and save for because it's the ultimate, natural end-game. However, there is nothing natural about it. In...

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Adventures in Middle School

As many of you know, we are developing an educational arm, Currency Camp, which will start out teaching kids to know & embrace their natures then move into much needed financial literacy skills. The first actionable step, we thought, was to...

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This is your life: Ages & \$tages.

Where are you in life and what does that mean for your financial plan?

There is a time to work, a time to relax, a time for joy, a time to help others, and a time to be helped by...

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What is Financial Planning?

Often financial planning is too closely associated with investing alone. Our approach is a seven-spoke wheel taking into account all the ways in which you interact with money and value as well as all the elements that go into a healthy...

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Allowance: Adolescents to Young Adults

Before jumping in, take a look at the broader context and relevant details, and find your child's nature. Job & Own: from 16 to 18 it's important for kids to do something for the world at large and get paid for it....

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