SAGE PATH
SOLUTIONS

in

(619) 501-6011

Financial Designs to Fit Your Life

It Begins With Your Story

You are unique. Your financial plan should be too. We start your planning process by listening to what's important to you and what makes you tick. Then we roll up our sleeves to create a game plan and an investment strategy that fits your needs.

But let’s not stop there. Our relationships are long term. We keep you on track with regular reviews so that we can talk about the changing markets, what’s happening in your life, and we look for planning gaps that may need attention.

Sage Path Solutions is a fee-only advisor. We hold ourselves to the highest fiduciary standard and we always act in the best interest of our customers.

Our Process

LEARN MORE

Portfolio Design

LEARN MORE

Elite IRA Advisor

LEARN MORE

Divorce Financial Analysis

LEARN MORE

You Decide

We want you to feel good about the way we work. Let's spend a complimentary hour together and get to know each other. After our meeting, you will receive a summary email and a few ideas to think about. Then you can decide if our firm is a good fit for you.

Ready to see what's in store for you?

WORK WITH US

What’s Your Risk Number?

Times are uncertain and markets can be scary. It’s important to understand how much risk is right for you. Take this quick test to discover your risk tolerance and see what volatility can do to you. Your score can be used to design an investment portfolio that fits your needs and comfort level.

How much risk is right for you?

FIND YOUR SCORE

Stay Informed

We believe that an education makes a difference. Whether you are just beginning to learn or you need advanced information, we want to be a resource for you. We provide videos, newsletters, and a broad array of information about investing, the markets, taxes, and regulatory changes.

Sign up for our newsletter.

START LEARNING

Learning Together

Don't want to learn from a book or computer? You're not alone. We find that most people like to interact with others, ask questions, and develop critical thinking skills. We host professionals and guest speakers who talk about the latest developments in the markets and other eminent topics that can affect your planning.

WANT TO JOIN US?

Contact

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