



INDIVIDUAL WEALTH MANAGEMENT

Wellspring Financial Partners ensures every client – regardless of personal wealth – has access to education, as well as the information, support, and mentoring they need, to be fully in charge of the entire spectrum of their financial life. [read more >](#)

EMPLOYEE RETIREMENT PLAN SPONSORS

An employee retirement program can be a powerful tool that attracts top talent, and drives employee retention and loyalty. When it comes to your plan, Wellspring Financial Partners always has your best interest in mind, as well as your employees'. [read more >](#)

RETIREMENT PLAN PARTICIPANTS

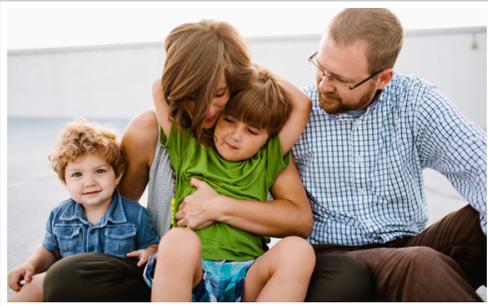
The retirement savings plan offered by your employer may be one of your most important assets. Wellspring Financial Partners can help you reach your retirement goals by making the complex simple. [read more >](#)

You first. Always.

Wellspring Financial Partners provides financial planning and investment advice to individuals as well as companies that sponsor retirement plans and their employees. Wellspring is focused entirely on our clients' financial well-being. Unlike most financial advising firms, we're independent and not controlled by a Wall Street company. We are "fee-only," paid only by our clients to serve our clients. We're not paid to sell any financial product, so we work exclusively for our clients.

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How can we help?



FOR EMPLOYERS

For Employers who provide retirement plans for their employees Wellspring Financial Partners is a premier retirement plan advisor offering a comprehensive suite of services to corporate qualified retirement plans including 401(k), 403(b), Profit Sharing, 457 and Employee Stock Ownership Plans. As a Registered Investment Advisory Firm we serve as a co-fiduciary with the Plan Sponsor which holds our team to a greater level of responsibility in BOTH legal and ethical standards.

FINANCIAL PLANNING

At Wellspring Financial Partners, we want you to invest and take financial control over your life. We take the time to truly get to know you and your financial status world. Only then do we develop a plan specifically for you. Then, we want you to be a wise consumer. The financial services industry has served itself very well, but by teaching you about the financial marketplace, we can make you an educated client who makes the financial world serve you.

INVESTMENT ADVISING

We believe that by using an investment strategy, designed to fit the plan we create together, you will have the highest level of success possible. Our investment strategy takes a broad and globally diverse approach to the capital market and employs the industry's leading passive investment vehicles from Dimensional Fund Advisors.

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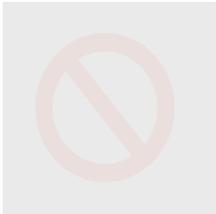


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Wellspring Financial Partners provides financial and investment advice to both individuals as well as companies that sponsor retirement plans for their employees.

Wellspring is focused entirely on our clients' financial well-being.

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Adapt to the shifting priorities of modern workers to...



Millennials Know It All. But, Are They Saving for Retirement?

By Jamie Hayes, CPFA, C(k)P®,

AlF®, Senior Plan Advisor...

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