

☎ (714) 971-0663 (tel:(714) 971-0663)

📍 5011 Argosy Ave, Suite 7, Huntington Beach, CA 92649

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INSPIRED  
FINANCIAL

(<https://www.inspiredfinancial.biz/>)

# Clarity. Insight. Partnership.

*“The promise of a woman inspired with purpose is too powerful and important to allow self-doubt to slow her down.” –Evelyn Zohlen*

WHO WE SERVE ([HTTPS://WWW.INSPIREDFINANCIAL.BIZ/WHO-WE-SERVE](https://www.inspiredfinancial.biz/who-we-serve))





## Why Inspired Financial

Founded in 2003, Inspired Financial™ is a fee-only Registered Investment Advisor providing comprehensive wealth management services. We strive to be the “kind of advisor our clients didn’t know existed” by providing a level of personal care and understanding that goes beyond expectations.

## Your Trusted Partner Through Life’s Transitions

An Inspired Financial™ approach will enable you to:

- Help and protect your family
- Enjoy and maintain your lifestyle
- Plan ahead for the expected and unexpected
- Create a legacy
- Feel secure knowing that your financial affairs are in order

Our goal is to empower clients – primarily women and families – to feel comfortable managing their financial lives, especially during and after times of significant change. Our passion derives, in large part, from our own personal experiences with life-altering events.

We help you make the best use of the resources you have to benefit your life, your family and your community. “Wealth” is not just the money you have, it is your ability to use money to achieve the kind of life you want. **We invite you to learn more about how we can benefit you and your family.**





**SCHEDULE CALL TODAY ([HTTPS://WWW.INSPIREDFINANCIAL.BIZ/CONTACT-US/](https://www.inspiredfinancial.biz/contact-us/))**

## **FAQs**

**WHAT IS FINANCIAL PLANNING AND WHY DO I NEED IT?**

**DO YOU WORK WITH PEOPLE LIKE ME?**

**HOW DO WE WORK WITH YOU?**

**HOW ARE YOU PAID?**

**HOW DO I GET STARTED?**

**DO I NEED TO LIVE IN HUNTINGTON BEACH TO WORK WITH YOU?**

**WHAT IS A CERTIFIED FINANCIAL PLANNER™?**

***“The question isn’t who is going to let me; it’s who is going to stop me.”***

***Ayn Rand***



# Who We Serve

*Most of our clients fall into two main groups: women and families.*

Because we take a comprehensive or “holistic” approach to **wealth management**, our clients feel that we work with them rather than just their money.

One of the benefits of this approach is the help we provide clients as they face a transition from one life stage to the next. For our female clients, this might mean managing her financial affairs through life issues such as:

- Loss of a spouse or loved one
- Divorce
- Job/Career change
- Sale of a business
- Retirement

For families, these transition issues include children and grandchildren going to college, the move into retirement, family and relationship changes, caregiving and dealing with aging parents.

We offer clients a unique insight into the particular issues that concern them. For some, we act as an educator. For others, a coach or mentor. **For most, we are an important catalyst and trusted partner that empowers them to take control of their financial lives.**

## Client Stories

We would love to share a few client stories with you to give you an idea of the types of real-life situations that we’ve navigated with our clients.

**LIFE IS A SERIES OF TRANSITIONS**

**MINDING THE SHOP AND TAKING CONTROL**

**WEALTH PLANNING IS A FAMILY AFFAIR**

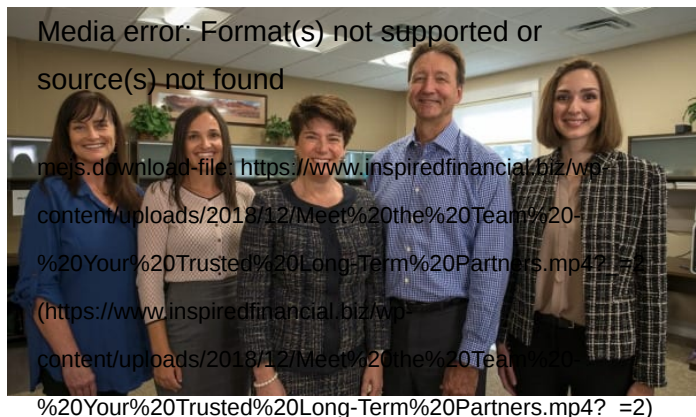
**SELLING A BUSINESS AND MOVING TO A NEW LIFE**

## Team



The experienced professionals at **Inspired Financial** are well positioned to be your trusted long-term partners.

Our collaborative style is client focused and results oriented. We are a highly credentialed team that is passionate about continuing education to remain on the forefront of our profession.



**Evelyn M. Zohlen, MBA, MS, CFP®**  
PRESIDENT

**Mark L. Prendergast, CPA, CFP®, CDFATM**  
DIRECTOR OF TAX STRATEGIES



**Leslie Rea, MBA, CFP®**  
LEAD FINANCIAL PLANNER

**Maria Castillo Dominguez**  
FINANCIAL PLANNER

**Lia Adams**  
CLIENT SERVICES MANAGER



*“Someone’s sitting in the shade today because someone planted a tree a long time ago.”*  
*Warren Buffett*

## How We Help

### HOW WE HELP

Major transitions in life such as retirement, death, divorce, income fluctuations, or sudden wealth provide opportunities for us to help you smooth the passage through the financial life cycle.



To achieve the goals that are important and unique to each valued client, we have a disciplined and structured approach.

### Our [Comprehensive Wealth Management](#)

(<https://www.inspiredfinancial.biz/#1535981691415-0d168d9e-e843>) services will often involve insurance, tax and estate planning, and sound investment management. We have developed a consultative process that we follow with each client to ensure that our solutions meet your needs now and into the future as your life changes.

If you are a new or potential client, we want to spend time getting to know you to ensure that there is a fit between our firm and your circumstances and that our relationship is comfortable from the onset. We accomplish this goal by taking you through our [New Client Process](#) (<https://www.inspiredfinancial.biz/#1535981743552-c21d9cec-c693>).

The one thing our clients have in common is a need for a partner who understands their unique situation and can help them understand their planning opportunities—both today and tomorrow.

## COMPREHENSIVE WEALTH MANAGEMENT

### FINANCIAL PLANNING

### INVESTMENT MANAGEMENT

### NEW CLIENT PROCESS

### OUR FEES

*“Life is like riding a bicycle. To keep your balance, you must keep moving.”*  
*Albert Einstein*





# Our Blog

## The Keys to Happiness

(<https://www.inspiredfinancial.biz/2019/07/the-keys-to-happiness/>)

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(<https://www.inspiredfinancial.biz/2019/07/the-keys-to-happiness/#respond>)

July 8, 2019

(<https://www.inspiredfinancial.biz/2019/07/the-keys-to-happiness/>)

## Distracted Driving – A Biker Babes Worst Fear

(<https://www.inspiredfinancial.biz/2019/06/distracted-driving-a-biker-babes-worst-fear/>)

(<https://www.inspiredfinancial.biz/2019/06/distracted-driving-a-biker-babes-worst-fear/>)

June 21, 2019

(<https://www.inspiredfinancial.biz/2019/06/distracted-driving-a-biker-babes-worst-fear/>)

## Preventing Identity Theft

While on Vacation (<https://www.inspiredfinancial.biz/2019/06/preventing-identity-theft-while-on-vacation/>)

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(<https://www.inspiredfinancial.biz/2019/06/preventing-identity-theft-while-on-vacation/>)

June 5, 2019

(<https://www.inspiredfinancial.biz/2019/06/preventing-identity-theft-while-on-vacation/>)

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## Contact Us

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(<https://www.feeonlynetwork.com/>)

(<http://www.letsmakeaplan.org/>)

(<https://www.onefpa.org/about/Pages/default.aspx>)

(<https://www.napfa.org/>)

(<https://resources.tdainstitutional.com/advisor/growing-rewarding-successful-business-featuring-evelyn-zohlen/>)

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## Important Links

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- » [Team \(https://www.inspiredfinancial.biz/#team\)](https://www.inspiredfinancial.biz/#team)
- » [How We Help \(https://www.inspiredfinancial.biz/#how-we-help\)](https://www.inspiredfinancial.biz/#how-we-help)
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