



# Pursue Happiness

We'll take care of the rest.

Hello there! We're OLIO Financial Planning, but you can call us OLIO for short.

You probably don't have to be told that your needs are unique and specific. You might feel your finances demand time you'd rather spend elsewhere or you simply just don't have the expertise. You've received plenty of advice from friends, family, the internet, and perhaps other professionals.

## We're delighted to meet you.

Now it's time to focus on outcomes. Your outcomes. We'll deliver strategies that overcome the barriers you face and provide the vision you've always desired. You'll be empowered to accomplish your personal and financial goals. The muscle behind our service allows you to implement and monitor your progress along the way when it's convenient for you.

Money is not the most important thing in life, but it impacts how you live, work, and play. It's an essential part of your daily life. It's as much about number crunching, as it is just knowing you'll be okay.

We provide clear guidance for your entire financial life to help you live well. Taxes, estate planning, cash management, insurance, investments, and retirement planning are the six core areas of financial planning. We balance an equal focus on all of them, and we make sure you share in our expertise by prioritizing your ongoing education. We believe that your

finances should support and enhance your life - helping you pursue what you care about.

OLIO Financial Planning was founded with a rebellious and stubborn objective: to provide financial planning to all using a revolutionary fee structure. One that's easily explained and simple to understand. To transform, instigate, rally, and delight.

Our motives require a very simple explanation. The industry is dominated by firms offering complicated fee structures based on transactions or how much money they're managing. Often times leaving clients in the dark about how much they're actually paying.

By circumventing the traditional mindset of the industry and leveraging technology, we're able to offer — extraordinary service at a fraction of the price—while at the same time spending more time with our clients, since that's what we enjoying doing most.

### How it Works

We work in a team environment. We believe you're best served when we put multiple heads together. Your questions are answered regardless of whether someone is out sick, watching their kid's soccer match, or on vacation. We'll match you to a team of people who specialize in your unique

personal and financial situation. Each one of us cares about the work we do and the goals you achieve. It's not just a career for us. When our clients succeed, so do we.

We're a unique group passionately pursuing the meaning of our clients' money. Turning obstacles into opportunities. We're intrigued by edges and unknowns. We ask lots of questions and feel collaboration is the glue that holds it all together. Our curiosity uncovers the heart of the story.

We are relentless about results. Unreasonable about standards. Selective about clients. We don't care how much you have, but rather, what you aspire to do with it. Our preference is long-lasting relationships that are mutually-rewarding. You'll find us creative, committed, and perhaps different.

We've played whiffle ball in backyards. Have a passion for music. Worked on Christmas tree farms and assembled trophies. Taught in the field and in the classroom. We bike, hike, surf, and swim. You'll find a fisherman and a seamstress. Travelers exploring both near and far and embracing learning about cultures different from ours. Make biscuits and gravy using Grannie's recipe. Our four-legged companions inspire us. We rebuild and invent. Our friends are loved and families cherished. We listen and we study. We work hard. We work smart. Most importantly, we nurture.

Our clients aren't just top of mind but also deep in our hearts. Every day we come to work grateful to serve. We think we are easy to work with and are enthusiastic about helping our clients accomplish their financial goals.

## Meet the Team

Tysons Corner, VA  
703 459 9299

Blacksburg, VA  
540 961 6706

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