

SHANNON FLEENER, CFP®

CEO & PRINCIPAL
FINANCIAL PLANNER

Sage Financial

San Diego, CA

[www.sagefinancialsd.com/
refer-to-shannon](http://www.sagefinancialsd.com/refer-to-shannon)

WHO I AM

Advice-Only CFP® Practitioner

- Fixed Fee-Only Fiduciary
- Bilingual (English/Spanish)
- Educational Background
 - Master's in Education
 - Dual Bachelor's degrees
- Prior to Sage Financial
 - Worked with tech EEs in all life stages from large companies e.g. Zoom, Snap, Workday

PLANNING SERVICES

1. Hourly

Three hour minimum
\$200/hourly flat fee

2. One-Time Planning

Six month engagement
\$1,800-\$6,250 per plan

3. Ongoing Planning

One year engagement
\$2,400-\$8,700 per year

Refer Clients & Prospects to Shannon



WHO I WORK WITH

- Early & Mid-Career Professionals
- Women & Couples
- Tech Employees
- FIRE Aspirers
- First-Generation Wealth Builders
- Values Based Investors

Have a committed moderate-income prospect in mind? I accept hourly clients (as capacity allows) and have had success creating a basic plan in 3-5 hours for those with simpler finances.

HOW TO REACH ME

- **Mobile:** (619) 432-5078
- **Email:** shannon@sagefinancialsd.com
- **Social :** @sagefinancialsd