WHEN TO REFER A CLIENT OR PROSPECT TO ME

XENA
FINANCIAL PLANNING

DANIKA WADDELL, CFP®, RLP®, CSLP®

President & Founder
Seattle, WA
danika@xenafp.com

- Fee-only, fiduciary advisor.
- Ongoing financial planning. Flat, annual fee starting at $6,000 for individuals, $7,500 for couples (includes optional investment management up to a certain point).
- Education: BA Mathematics, Oberlin College. Currently pursuing a MS in Advanced Financial Planning with a concentration in Life Planning through Golden Gate University.

THINK OF ME WHEN...

You're working with a tech employee, early to mid-career stage who would like to:

- Diversify out of a concentrated stock position.
- Efficiently exercise or sell company stock options and/or restricted stock units.
- Learn where to save extra income if they are already maxing out their 401(k).
- Get help setting up a structured charitable giving plan.

Are they looking to answer questions such as:

- Are my investment accounts allocated appropriately and aligned with my values?
- We'd like to buy a house but we're not sure how much we can afford? How does that fit in with our other goals?
- How do I start saving for my kids and their future college expenses?

IF THEY'RE A GOOD FIT

The best way to refer someone to me is with a mutual introduction email:

I want to introduce you to Danika Waddell. She is a Financial Planner and the Founder of Xena Financial Planning. She is a fee-only, fiduciary advisor, meaning she is only compensated directly by clients. Click here to schedule a meeting with Danika.