Sound financial planning helps keep you on the right track toward realizing your dreams and goals.

Financial Connections offers as-needed hourly financial planning to answer questions, resolve difficult financial issues, and create solutions.

As our lives change, whether it be preparing for retirement or saving for college, our financial goals need updating to keep pace. Working with a fee-only financial planner can help you identify adjustments necessary to keep you on track towards realizing your financial future.




Hourly planning with no minimum fees, assets, or income requirements.

Hourly planning is ideal for those who:

- Would like to review their overall financial health
- Are beginning long-term planning and need a financial road map
- Have never sought professional financial advice
- Seek retirement planning strategies
- Want to integrate their current investments with their 401(k)
- Would like a second opinion on a current plan or investment
- Have questions about reducing taxes
- Need to set up funds for college
- Would like to discuss inheritances or reinvest assets
- Would like to review investment options in a company retirement plan

Meeting with a financial planner helps put you in control.

Address issues that could impact your financial future. Our advisors will create a plan that reflects your resources and helps you set reasonable goals.

Financial Connections will help you:

- Gain clarity on where you want to go
- Create a plan on how to get there
- Strengthen your perspective of your finances
- Be more organized
- Benefit from a professional advisor who puts your interests first
- Achieve your goals and dreams

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Connecting your finances with your future

21 Tamal Vista Blvd., #105, Corte Madera, CA 94925 ● (415) 924-1091 ● www.FinancialConnections.com

Get the most out of hourly planning

Effective hourly planning requires coming to your appointment prepared. Our online questionnaire and worksheets will help you get started gathering the necessary information for your consultation. Make notes on questions that you need to ask so that we can optimize our time together. Expect that it may take time to have the variety of alternatives analyzed.

Financial Connections' Mission Is To:

Help our clients integrate their image of the future with their financial resources

Promote an open two-way communication leading to a relationship based on trust

Cultivate an atmosphere that leads to reasonable expectations and responsible decisions

Deliver high-quality services and retain our client's trust

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We sell no products, make no commissions, and there are no hidden fees. You will be charged only for the time we spend to deliver your financial road map.

Meet Our Financial Planners:

Jenny Coffey Smith is a fee-only Certified Financial Planner™ Professional.

Jenny joined the Financial Connections team in 2013, after nine years with The Vanguard Group. Her various positions included Client Relationship Manager, Retirement Advisor, and Investment Consultant for Ultra High Net Worth clients. Jenny was also an employee of Nestwise, a venture offering financial advice for the mass market.

Jenny has a B.S. in Economics from Arizona State University and a MS in Security Analysis and Portfolio Management from Creighton University. She recently moved to the Bay Area and has become active at The Crossroads, an organization that helps homeless youth and young adults just starting out. Jenny also serves as a committee lead for Emerging Advisors with the FPA of San Francisco.

Kai Bogdanovich joined Financial Connections in 2014 as our Client Services Administrator. She became a Registered Paraplanner℠ in May 2015. Kai helps prepare for financial planning meetings; gathers records and reports; and assists preparing financial scenarios.

Prior to joining Financial Connections, she was Assistant Branch Manager with Bank of America.

Kai earned a B.S. in Business Administration from San Francisco State University and was on the Dean's List.

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