Welcome to Inspired Financial

We work with you to provide thoughtful comprehensive wealth management services — financial planning and investment management — based on the needs, concerns, opportunities and goals you have both today and in the future.

- Our standard is a level of personal care and support that exceeds expectations
- We are passionate professionals dedicated to the welfare of each client
- Our highly-trained team consists of three CFP® professionals and a CPA who are committed to our profession
- Fees are in alignment with our clients' best interests

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.

Why Inspired Financial?

Our work with you will help you live a simple and elegant life, navigating life's transitions with the comfort that you are getting inspired financial advice.

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

Inspired Financial 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

LEFT TO RIGHT: Mark Prendergast, CFP®, CPA; Beth Waterman; Evelyn Zohlen, CFP®, MBA; Laurie Dubchansky, MS; Kevin Henss, CFP®, MA

Meet Our Team

The best way to see if our style is a fit for you is to meet with us and let us get to know each other.

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INSPIRED FINANCIAL

Your Trusted Partner Through Life's Transitions

Our Mission

Inspired Financial empowers clients — primarily women and families — to feel comfortable managing their financial lives, especially during and after times of significant change. We stand with and educate clients during all life stages, instilling in them financial peace of mind, and allowing them to live a simple and elegant life. Caring for clients as if they were family — that's what Inspired Financial is all about.



Our goal is to provide personalized advice and guidance so that our clients feel empowered to make informed decisions and feel secure that they are on track to achieve their goals and dreams.

Who We Are

We are experienced professionals who 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 who are passionate about continuing education to remain on the forefront of our profession.

How We Help

Our job is to help you make the best use of the resources you have to benefit your life, your family and your community.

To achieve the goals that are important to you, we utilize a disciplined and structured approach with all of our clients:

Understanding Your Situation: We ask questions in order to fully understand your concerns, needs, opportunities and goals.

Building A Strategy: Recommendations are tailored to you and we pride ourselves on independence in the strategies we suggest.

Implementing Your Plan: We will present our recommendations, ensure that you are comfortable with them and then implement them. We pay close attention to fees and tax considerations so that all of your money works for you.

Keeping You Up-To-Date: We enjoy long-lasting relationships with our clients, have regular contact and are continually reviewing your plan in the face of any changes that affect your life.

Why We're Different

We provide Clarity, Insight & Partnership

Clarity describes our conversation with our clients as we learn more about them and they learn more about themselves.

Insight is what we bring to the table, using our experience and expertise along with support from other professional partners to provide the best solutions to meet each client's unique needs.

We work in **partnership** with our clients in an ongoing relationship. We recognize that life is continually changing, and we want to be there for our clients as they transition through life's stages.

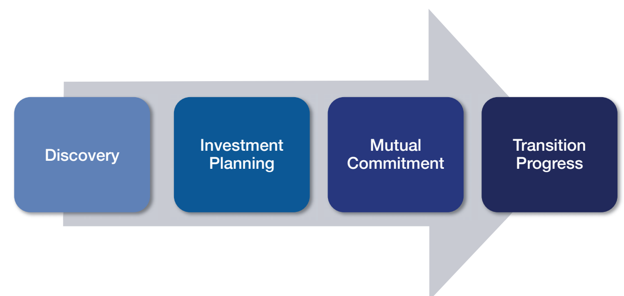
Who We Serve

Our clients are generally a select group of women and families in transition who look to us to help them make the best use of the financial resources they possess. Some of life's transitions we have experience working with include:

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

New Client Process

We spend the required time to get to know our new clients. Our client-centered Discovery Meeting ensures our planning is directly aligned with your goals and needs.



We have regular progress meetings with our clients to review any major changes in your personal or financial situation. If these changes mean that we need to make adjustments to your plan, we do so. We also review your overall progress toward your long-term financial goals.