A REFERRAL GUIDE

Referring clients to Jacob Stalder, CFP®

A quick reference for professionals and clients who wish to send someone my way.

ADVICE-ONLY PLANNING

I run a 100% virtual, advice-only firm — no minimums, no account transfers, and no product sales. My typical client is comfortable managing their own investments and wants ongoing, unbiased guidance that reaches beyond investments into cash flow, taxes, insurance, and more. In-person meetings are available in the Cedar Falls area.

PLANNING SERVICES & FEES

Comprehensive Plan — from $3,375

A project-based roadmap for your top financial goals, with a detailed action plan and resources. Best on the cusp of early retirement or with significant near-term needs. Fee varies with complexity.

One-Time Strategy Session — $1,375

A two-hour intensive covering your top-of-mind planning needs — also ideal as a second-opinion review of an existing plan.

Ongoing Planning — $195/mo or $195/qtr

Year-round monitoring of your plan, investments, cash flow, and taxes, with regular meetings and accountability. Optional after an initial plan — strongly encouraged.

Small-Business Group Sessions — Complimentary

Financial education group sessions for small-business owners and their employees.

Pro Bono Planning — No cost

1–2 hours per month for families facing financial hardship, cancer survivors, and local non-profits.

TOPICS I COVER

Cash Flow & Budgeting · Tax Planning · Investment Strategy · Early Retirement · Insurance · Education Funding · Stock Options · Estate Planning · Money Psychology

WHO I SERVE

- Early retirees & FIRE pursuers
- Individuals nearing retirement
- Recently married couples
- High-earning young professionals
- Business owners
- Those navigating a life change

ABOUT ME

- Advice-only fiduciary & CFP ® professional
- BA in Psychology & Business, Iowa Wesleyan University
- 10+ years in financial services
- Member: NAPFA, XYPN, Fee-Only & Advice-Only Networks

Jacob Stalder, CFP®
OWNER & FINANCIAL PLANNER

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Navigate Financial Planning LLC is a registered investment adviser offering advisory services in the State of Iowa and other jurisdictions where exempted. Registration does not imply a certain level of skill or training.