

List of flat fee advisors by state

Please use this list to contact flat fee advisors close to you for networking or other purposes.

Please note:

This list of flat fee advisors by state is not an endorsement of any particular individual, their firm, or their services; please do your own research when selecting a financial advisor. There is nothing that guarantees that accuracy of this content and it is subject to change without notice.

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Alabama

Chad Holmes

<http://www.formulawealth.com>

Flat-fee comprehensive financial planner helping baby boomers and their parents proactively minimize taxes between the two generations.

Arkansas

Jacob George

<https://worthwhileretirement.com/>

Flat-fee financial planning for Christian families wanting to make an eternal impact!

California

Chris Randall

www.axiscapmanagement.com

Flat-fee monthly subscription based financial planning for millennials and first-time investors.

James Schwarz

www.ClearRetirementAdvice.com

Flat fee; to be more precise -- Equal Flat Fee (every client pays the same amount).

Josh St. Laurent

<https://www.wealthinyourself.com>

Flat-fee financial planning for people working remotely and striving for financial freedom.

Eric Niergarth

<https://www.retirementroadmapfinancialplanning.com/>

Flat fee with the option of Advice Only.

Danielle Miura

<https://spark-fin.com/>

Flat-fee, advice-only financial planning for family caregivers and their loved ones.

Matthew Etzler

<https://www.etzlerfinancial.com/>

Colorado

Skip Fleming

<https://lodestarp.com/>

Advice only planner

Downshift Financial

<https://downshiftfinancial.com/>

Eric Courage

[Margin](#)

Flat fee advisor

Delaware

Sam Lewis

www.wecanplanforthat.com

Flat Fee and hourly

Advice-only only planning to help young professionals and pre-retirees retire early.

Florida

Kelly Berenbaum

<https://bluetreefi.com/>

Flat fee, fiduciary

Christopher Diodato

<https://wellthfp.com/>

Flat-fee financial guidance specializing in individuals interested in FIRE/early retirement.

Chris Shoup

<https://southshorefp.com/>

Georgia

David E. Barfield, CFP®

www.datapointfinancialplanning.com/

Flat-fee, advice-only financial planning for Millennial and Gen Z tech professionals and business owners

Illinois

Daniel Bishop

Blackswanfp.com

Howtopayforcollege.app

Flat Fee, Advice Only - 0 AUM RIA

Brad Bobb

www.bobbfinancial.com

Retirement planning for federal employees

Mark Meredith

<https://www.meredithwealth.com/>

Meredith Wealth Planning

Indiana

Michael Reynolds

<https://www.elevationfinancial.com>

Flat fee fiduciary financial planning & ESG investing

Iowa

Mike Dunlop

<https://www.igniteplanning.com/>

Michigan

Scott Salaske

www.firstmetric.com

Low cost, flat fee advisor

Anthony Watson

<https://thrivertire.com/>

Mississippi

Jay Zigmont

<https://childfreewealth.com/home>

Advice-Only, Fee-Only Life and Financial Planning for Childfree and Permanently Childless People

New Jersey

Igor Smolyanskiy

<https://www.vilga.com/>

Flat-fee planning with optional investment management for established financial services industry professionals.

Steven Kampschmidt

<https://freedomfoundfinancial.com/>

Freedom Found Financial

Andy Panko

<https://tenonfinancial.com/>

Tenon Financial

New Mexico

Jose Sanchez

<https://josevsanchez.com/>

Flat fee financial planning for families living with and through Alzheimer's

New York State

Laura Rotter

www.trueabundanceadvisors.com

I am an annual retainer, flat fee advisor.

James DeVico

www.mountainpassplanning.com

Flat fee asset management and financial planning is the main offering. I also offer AUM for clients who do not want planning.

Ford Financial

<https://www.fordfinancialsolutions.com/>

North Carolina

Rupa Pereira, EA

www.fwjplanning.com

FWJ Planning is an advice-only firm that primarily caters to working immigrant households navigating cross-border finances, sandwiched generational obligations and cultural contexts.

Don Rudolph

flatfeecio.com

Fixed fee fiduciary for families, foundations, and small business 401(k)s.

Aaron Parish

<https://www.levelwm.com/>

Level Wealth

Stephan Shipe

<https://www.scholarfinancialadvising.com/>

Scholar Advising

Ohio

Curtis Bailey

quietwealth.net

Flat Fee of \$6,000 per year charged at \$500 per month

Brian Tegtmeyer

<https://trulyprosperfp.com/>

Flat Fee financial planning, investment management, and tax planning for new retirees. I also provide one-time retirement plans for DIY investors.

Oregon

Andrew Gray

www.graywealthstrategies.com

Flat Fee only (ongoing and one time plan) specializing in retirees and those approaching retirement.

Corey Beal

<https://empoweringfinance.com>

Pennsylvania

Bill Hines

www.emancipare.com

We are advice-only, flat-fee, fee-only, transparent, holistic, inexpensive, and most importantly, altruistic and honest!

Devin Faddoul

www.addafinancial.com

Flat fee advisor in Pittsburgh

Texas

Allen Mueller

www.7saturdaysfinancial.com

Flat-fee planning (ongoing or one-time) with optional investment management.

Utah

Ryan Kelly

<https://rfkcapitalmanagement.com/>

Virginia

Chris Urban

www.discoverywp.com/

Discovery Wealth Planning, a Registered Investment Advisor based in Virginia, provides life-centered personal financial planning for a flat, annual fee.

Mike Powers

<https://manukafinancial.com/>

Flat-fee financial planning, investment management, and tax planning helping individuals transition to retirement. Tax preparation is also available.

Matthew Jenkins

<https://noblehillplanning.com/>

Washington state

Kevin Estes

<https://www.scaledfinance.com/>

Hourly financial planner helping T-Mobile employees and families live their best lives.

Washington, DC

Kevin Mahoney

<https://illumintfc.com/>

Financial planning for millennials

England, UK

Jenny Ives

<https://www.peritofp.com/>

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