

F5 Financial is a fee-only wealth management firm with a holistic approach to financial planning. Personal goals, and behavioral change. Through our F5 Process, we provide insight and tailored strategies that inspire and equip our clients to enjoy a life of significance and financial freedom.

F5 Financial Health Cycle™



FAITH

Faith is our belief in a higher power beyond our individual selves. Our faith is at the core of all we do. In developing a deeper relationship with our Creator, we are able to improve our relationship with ourselves, our family, and our friends

FAMILY

Family is our relatives. Everything we have done, will do, or are doing should enhance the vitality of those relationships.

FRIENDS

Friends are the people with whom we choose to spend our lives. We honor our friendships when we choose to spend time with, respect the beliefs of, and support the choices of our friends. We are made by our Creator to be in relationships with others

FITNESS

Fitness requires that we maintain our physical social, and mental health. When we are healthy, we are best able to relate to our faith, our family, and our friends. A focus on health is necessary to live a life of freedom and significance.

FINANCE

Finance refers to the collection of assets and liabilities that support the life we choose. Finances are only relevant in relationship to how they allow us to pursue our faith, family, friends, and fitness. The healthier our relationship with finances, the more we have the freedom and opportunity to lead a life of significance.

VISION

To cultivate a brand culture of intentionality, accountability, discipline, and courage as we provide insight and tailored strategies that inspire and equip our clients to live a lifestyle of significance and financial freedom.

F5 VALUES

INTENTIONALITY

We have a clear vision, full heart and live our lives on purpose. Intentionality is our commitment to seize each moment, choose the greater good, and persevere through life's trials.

ACCOUNTABILITY

We say what we do, we do what we say. Accountability is the path to deeper exploration, new discoveries and transcending difficulties. Our culture of accountability bonds us to our word, and to each other.

DISCIPLINE

Life is a gift we value and revere through our thoughts and actions. As a way of expressing our gratitude, we employ the discipline it takes to honor the blessings of time and relationships.

COURAGE

We live in an abundant world where fear has no place in our hearts or minds. It takes great courage to live intentionally, to welcome accountability, and to remain disciplined.