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**Page 1 - Home Page**

**Finding Equilibrium In Personal Finance**

At Savoire Financial, we believe money is deeply personal and emotional. With expertise in behavioral finance, we help clients make sound long-term decisions while addressing fears and staying true to their goals, guiding them towards a well-lived life today and a prosperous future. Let us be your trusted partner in navigating the emotional aspects of money, empowering you to find balance between enjoying the present and securing financial well-being.

**Upholding Our Values In Everything We Do** (to replace “Our Approach”)

We are committed to excellence, providing the best care and support for our clients, while fostering a sense of community that allows us to connect, reach our goals, and feel safe and secure. With empathy and teamwork, we guide our clients through their money journey, collaborating with trusted industry professionals to ensure they receive the best possible care and services for themselves and their families.

**Our Services**

* **Comprehensive Financial Planning:** We provide comprehensive and personalized guidance, helping you navigate the complexities of financial planning, make informed decisions, and create a roadmap for your future, ensuring you are well-prepared for any challenges that may arise.
* **Asset & Investment Management:** We can help you achieve long-term financial success by creating customized investment plans for you and adapt as your needs and the market change. This will help build a strong base for your future wealth.

**Who We Serve** (to replace “Ready for the Next Step?”)

Our firm specializes in comprehensive planning for LGBTQ individuals and couples, unmarried partners, and women who are breadwinners and primary decision makers in their households. We understand the unique challenges and goals you face, and our dedicated team is here to provide personalized guidance and support, ensuring your financial future is secure and aligned with your aspirations.

**Quotes That Inspire Us** (to replace “Why Savoire Financial”)

* Quote here

(Keep contact form here)

(*Notes to CSC*:

* **SEO Title Tag:** Comprehensive Financial Planning for LGBTQ Couples & Women Breadwinners | Savoire Financial
* **Description Tag:** At Savoire Financial, we understand the unique financial challenges LGBTQ couples, unmarried partners, and women breadwinners face. Our team provides personalized services to help you make informed decisions and build a secure financial future.)

**Page 2 - About Us**

**What We Strive For**

Welcome to Savoire Financial, a premier financial advisory firm founded in 2022. At Savoire Financial, we are dedicated to providing exceptional financial advice and guidance to our valued clients.

Our journey began with a unique vision. Recognizing the dynamic nature of our client base, we embraced the virtual realm as advisors well before the pandemic. We understood the needs of our clients, who often pursued new and exciting opportunities outside the D.C. area, yet desired to continue our collaborative work together. By going virtual, we not only catered to their needs but also offered a more efficient meeting option in an area where even short distances can be time-prohibitive.

With years of experience in the industry, our team has the expertise to serve as your coach, counselor, and mentor on your journey to financial independence. We are committed to understanding your unique circumstances and tailoring our advice to suit your specific needs. Our comprehensive range of services ensures that we can guide you through various aspects of financial planning, providing you with a holistic approach to wealth management.

**Giving You Confidence In Your Financial Future**

We firmly believe that the greatest value we can provide our clients is confidence. We strive to instill confidence in every aspect of our work. We want our clients to feel assured that it's "okay" to spend their hard-earned money on life-enriching experiences, such as a dream vacation. We want them to feel confident that they are on track to achieve their significant goals, whether it's expanding their family, buying a house, or retiring comfortably. Our approach emphasizes striking a balance between enjoying a fulfilling life in the present while saving with an eye toward the future.

As a client-focused firm, we specialize in providing high-touch, education-based financial advice. We understand that financial decisions can be overwhelming, and our goal is to empower our clients to make informed choices confidently. Through our personalized approach, we help our clients navigate daily money decisions, set and reach long-term goals, and make wise investment choices. Our mindfulness-based methodology enables our clients to achieve their aspirations while avoiding the common pitfalls that can hinder meaningful financial success.

Thank you for considering Savoire Financial as your trusted financial partner. We look forward to partnering with you (hyperlink to “Contact” page) on your path to financial success and helping you gain the confidence you need to make sound financial decisions.

(Keep section for bios here – make sure dog biographies line up with their respective owners if possible)

(*Notes to CSC*:

* **SEO Title Tag:** Virtual Financial Planning Services Focused on Client Confidence | About Savoire Financial
* **Description Tag:** At Savoire Financial, our virtual financial advisors strive to provide exceptional service that instills confidence in our clients' financial futures. Learn more about our client-focused approach.)

**Page 3 - Our Services**

**How We Can Help You**

At Savoire Financial, we believe that money is emotional and highly personal. Our expertise in behavioral finance allows us to support our clients in making sound long-term decisions while addressing their fears and staying true to their goals. We help you live an amazing, well-lived life today while balancing long-term aspirations like sabbaticals, retirement, and financial freedom. With our comprehensive services, we guide you through the complexities of personal finance, empowering you to find the perfect equilibrium between enjoying the present and securing a prosperous future. Let us be your trusted partner in navigating the emotional aspects of money and charting a path towards financial well-being and peace of mind.

**Comprehensive Financial Planning**

As experienced financial advisors, we understand that managing your finances can be overwhelming and time-consuming. That's why we are here to guide you through the intricacies of financial planning, providing you with the expertise and support you need to make informed decisions. With our comprehensive approach to “surround sound” financial planning, we consider all aspects of your financial life to develop a customized strategy that aligns with your goals, values, and unique circumstances. Our experience and knowledge allow us to identify potential pitfalls and opportunities, helping you navigate complex financial landscapes with confidence. Together, we can create a roadmap for your financial future, ensuring that you are well-prepared for any challenges that may arise along the way.

Our comprehensive financial planning services also include:

* Cash Flow Analysis & Strategies
* Lending Strategies
* Retirement Planning
* Education Planning
* Employee Benefits
* Insurance & Protection Planning
* Goal Based Planning (such as a First or Vacation Home Purchase or Family Planning)
* Tax Strategies
* Estate Planning

**Asset & Investment Management**

When it comes to managing your assets and investments, partnering with an experienced financial advisor is essential for long-term financial success. As your trusted advisor, we take the time to understand your financial goals, risk tolerance, and time horizon. With this knowledge, we can develop a tailored investment strategy that aligns with your objectives. Our extensive market knowledge and research capabilities allow us to identify investment opportunities and mitigate risks. We actively monitor and manage your portfolio, making adjustments as needed to ensure it remains aligned with your changing needs and market conditions. We are dedicated to helping you achieve your financial goals and building a solid foundation for your future wealth.

Our asset and investment management services also include:

* Socially Responsible Investing

We’re ready to help you take the next step towards feeling comfortable and confident in your financial future. We hope you'll browse the various resources available on our website, and we welcome the opportunity to meet and discuss (hyperlink to “Contact” page) your unique financial circumstances.

(*Notes to CSC*:

* **SEO Title Tag:** Comprehensive Financial Guidance | Asset & Investment Management
* **Description Tag:** Savoire Financial provides complete financial planning services to create a roadmap for your future. We also offer tailored investment management and portfolio strategies.)

**Page 4 - Chloe Van Zandt Biography**

As a Financial Planning Assistant at Savoire Financial, my primary responsibilities revolve around assisting with client service follow-up activities. This includes handling account paperwork, processing distributions, and facilitating other financial transactions as needed. Additionally, I provide invaluable support to the team by managing calendars, preparing correspondence, and delivering exceptional customer service.

Before joining Savoire Financial, I had the privilege of working as a program director at a public health nonprofit. During my time there, I witnessed firsthand the impact that health and financial inequities can have on individuals and communities. This formative experience led me to pursue this career where I can make a meaningful difference in people's lives. Prior to beginning my career, I obtained a Bachelor of Arts in Communication from Boise State University in 2015 and, later, a Master of Arts in Public Health from George Washington University in 2022.

What truly drives me is my passion for helping individuals attain financial security. I firmly believe that everyone deserves access to the resources and knowledge necessary to make informed financial decisions. Particularly, I am dedicated to supporting marginalized communities and addressing the unique challenges they face. It is this commitment that led me to Savoire Financial, a firm that shares my values and places a strong emphasis on assisting and empowering the LGBT community and women.

Currently, I reside in the vibrant city of Richmond, Virginia alongside my partner, Becky. In my free time, I am an avid cook, constantly experimenting with new recipes and flavors. Home improvement projects also capture my interest, as I love creating a space that reflects my personality and brings comfort to those around me. Additionally, I enjoy hiking with my dogs, who are always eager to explore the great outdoors alongside me.

**Page 5 - Cris Caruso Biography**

As the Principal, Owner, and Financial Advisor at Savoire Financial, I oversee all operations of the firm, ensuring smooth functioning, and as a financial advisor, I provide comprehensive financial planning and investment management services to our valued clients.

My career in the financial services industry began in 2004, and I have had the privilege of working at reputable firms such as Ameriprise. Prior to that, I spent some time in the hotel industry, honing my skills in customer service and attention to detail. Over the years, I have dedicated myself to continuous learning and professional growth, earning both the Chartered Retirement Planning Counselor (CRPC) and Behavioral Financial Advisor (BFA) designations. Additionally, my educational journey has been diverse. I started with an Associate of Science in Hospitality Management from Bay Path University. Later, my passion for understanding society and its dynamics led me to pursue a Bachelor of Arts degree in Sociology and Gender Studies from the University of Southern Maine.

Combining my knowledge of finance with my understanding of social dynamics, I discovered my superpower: teaching. I absolutely love helping individuals who don't see themselves represented in the financial world comprehend complex topics, make confident money decisions, and unlock wealth they never thought was available to them. The joy of my work lies in the relationships I build with my clients. Being a trusted partner in their lives, I am honored to witness their successes, growth, and the milestones they achieve. My guiding principles are rooted in providing a judgment-free environment, offering clear education, and fostering accountability. I firmly believe that these values are the foundation for empowering my clients to make informed financial decisions and achieve their goals.

Originally from southern Maine, I now reside in Washington, D.C. with my spouse, Tina, and our tiny dog, Daisy. As a dedicated student of yoga since 2004, I find solace and continuous growth in my practice, and I recently completed yoga teacher training in 2022. In our leisure time, Tina and I enjoy embarking on day and weekend trips, seeking out delicious plant-based cuisine along the way. Exploring farmers markets, quaint towns, and historical sites, we find joy in immersing ourselves in new experiences. The ocean holds a special place in my heart, so our road trips often lead us to its calming embrace.

**Page 6 - Olivia Allen Biography**

As an Administrative Assistant at Savoire Financial, I am responsible for various crucial tasks, including onboarding new clients, providing excellent service to existing clients, and offering a second set of eyes when needed. Having worked in the financial services industry for over four years, I bring a wealth of experience to my role. Prior to joining Savoire Financial, I had the privilege of working at Planning Alliance, where I honed my skills and developed a deep understanding of the industry. Along the way, I obtained licenses for life and health insurance and was previously securities licensed, allowing me to provide comprehensive support to our clients. Additionally, my educational journey led me to the College of New Jersey, where I acquired a solid foundation of knowledge and skills.

The work I do as an Administrative Assistant keeps me on my toes. Whether it's guiding new clients through their first experience with a financial planner or exercising my problem-solving skills to troubleshoot transfer issues, every day presents unique challenges and opportunities for growth. More importantly, the work we do goes beyond dollars and cents. It's about helping individuals understand what they can do with their financial resources, ensuring they feel secure in their plans, and guiding them on the best path for their unique circumstances. What brings me the greatest joy in my job is the confidence we instill in people. Finances can be emotionally charged and cause significant stress, even for those who may appear financially well-off to others. Being able to provide reassurance and support to our clients is incredibly rewarding, and the positive feedback we receive from them makes every effort worthwhile.

I was raised in Princeton, New Jersey, and have also called Wilmington, North Carolina, and Steamboat Springs, Colorado, home at different points in my life. Currently, I reside in Arkansas, my partner's home state, where I am quickly learning to appreciate college athletics. I have a passion for travel and recently had the opportunity to fish in the breathtaking waters of Seward, Alaska. When I'm not in my home office, you can find me in a yoga studio, wake surfing on a nearby lake, or exploring nature through hiking adventures with my loyal companion, Jackson, my beloved dog.

**Page 7 - Jackson Bi-paw-graphy**

I'm Jackson, the Chief Lazy Coworker at Savoire Financial, where I bring the "pawsome" factor to the office. My primary responsibilities? Well, they're all about moral support and comic relief. I mean, who wouldn't want a fluffy buddy like me around? For the past four years, I've been rocking the financial industry alongside my fabulous mom, Olivia. We make an unbeatable team! But before my career took off, I was the undisputed king of the couch in our living room. It was a cushy gig, but I knew I was destined for greater things.

Now, let me tell you a little secret: Mama says I have to earn my way in this business. And boy, am I motivated by treats! Treats of all shapes and sizes, flavors and textures. They keep me on my paws and ready to conquer any challenge that comes my way. Who knew treats could be such a powerful motivator? But let's not forget my impressive list of certifications. Among them, I hold the prestigious title of Certified Cutie. My irresistible charm and adorable puppy eyes have been recognized by the experts. They say I could melt even the coldest of hearts with just one wag of my tail.

Now, here's the best part of my job: being with Mom at home AND work. Can you believe it? I get to spend all day with my favorite human, providing snuggles and smiles whenever they're needed. It's a dog's dream come true! We tackle financial tasks together, and I even lend a helping paw by reminding everyone to take much-needed play breaks. After all, work should be fun, right? While I may have started my journey in North Carolina, life has taken me on an exciting adventure across the country. I've lived in four different states, sniffing out new scents and making friends wherever I go. But for now, I call Northwest Arkansas my home. It's a place where dogs are notorious escape artists, but my mom keeps a close eye on me. Safety first, they say, even if I have a nose for adventure.

**Page 8 - Daisy Bi-paw-graphy**

My name is Daisy, but my proper title is Pretty Princess. I hold the prestigious role of being the Laziest Coworker of them all, and I take it very seriously. My primary responsibilities are quite important, you see. First and foremost, I excel at snoring really loudly during meetings. I believe my melodious snores have a calming effect on everyone around me, helping them find peace in the midst of chaos. Another crucial duty of mine is to consume all the delicious treats offered to me. It's a tough job, but someone has to do it. I take pride in my refined palate and never shy away from indulging in the finest culinary delights. I must admit, my taste buds are quite discerning. In addition to my snack duties, I am also responsible for helping my mom get away from her desk for walks outside. I understand the importance of stretching those legs and taking in the fresh air. It keeps us both energized and ready to tackle the challenges of the day.

But that's not all! I bring a lot more to the table. As the resident comic relief, I never fail to bring a smile to everyone's face. I also provide essential emotional support to my humans, offering a listening ear and a comforting presence during stressful times. And let's not forget the cuteness breaks on Zoom meetings. Whenever my mom is in a virtual gathering, I make sure to grace the screen with my adorable presence. I've been told that my mere appearance can brighten even the dullest of meetings. I'm a true Zoom superstar!

I've been living with my amazing humans, Cris and Tina, since August of 2021. They rescued me from a life of chaos, where I endured abuse and neglect. Luckily, those days are far behind me now. I live the life of luxury that I've always deserved, and I couldn't be happier. My gratitude shines through in the form of snuggles, kisses, and adorable antics, but only when I feel like it. After all, a pretty princess must maintain her regal air.

**Page 9 - Bandit & Yori Bi-paw-graphy**

We are Bandit and Yori, and we're here to spill the kibble on our exciting roles at Savoire Financial, where we work alongside our amazing mom, Chloe. Together, we form an unstoppable trio, bringing our unique talents and boundless energy to the office.

First up, let's introduce Bandit, the CFO (Chief Fetch Officer) and holder of a prestigious PhD in squirrel science. Bandit's primary responsibilities revolve around the fascinating world of squirrels. When not engrossed in squirrel science, Bandit can be found panting enthusiastically, providing emotional support to the team, and reminding everyone to take a well-deserved break for some belly rubs.

And then there's Yori, the Assistant to the CFO and a Pre-K graduate in occasional obedience. Yori's primary responsibilities are a bit more whimsical. Dreaming is a crucial part of Yori's job description, as it fuels our collective imagination and keeps us inspired. And let's not forget the legendary Yori zoomies, which never fail to inject a burst of joy and laughter into the office atmosphere.

Together, we form a dynamic duo, each contributing our unique talents to the success of Savoire Financial. Our mom, Chloe, couldn't be prouder of our achievements. She knows that while we may not have traditional job titles, our presence and contributions are invaluable. We keep spirits high, promote a positive work-life balance, and remind everyone to embrace their inner puppy.