

SAN DIEGO FINANCIAL

Empowering Prosperity, The Woman's Way

Fleming & Associates, LLC makes business success and personal wealth management compatible for high-achieving entrepreneurs and executives.



“Building a thriving business and generating high revenue is a different skill set from creating and managing personal wealth, but successful individuals may feel shame when they don't know how to do both,” says Jamie Fleming, CFP®, CRFA®, founder and CEO of Fleming & Associates, LLC. “While they may have nice cars and second homes, most do not have a comprehensive, written financial roadmap to grow and protect the wealth they've worked so hard to achieve.”

Can you relate to one or more of the following?

- A successful entrepreneur generating hundreds of thousands in business revenue lacks the time to manage her personal wealth.
 - A company owner with millions on her corporation's balance sheet fails to plan for retirement.
 - A CEO feels ashamed because her personal finances are messy, but she's unsure where to turn for help.
- These scenarios are common among high-achieving businesswomen, says

Fleming, whose firm takes a proactive approach to personal financial management and the long-term success of entrepreneurs and executives.

For these individuals, Fleming & Associates offers a full suite of services—including financial coaching and future planning, asset management, risk assessment, estate planning, and investing—custom designed to help clients gain a clear financial vision, build confidence around money, and achieve what they want in life. “Business success and personal prosperity should go hand in hand, and we help clients join the two,” Fleming explains. “Lasting financial success and security are possible. Don't settle for less.”

Guiding Goals

As a successful female business owner in her own right, Fleming is passionate about empowering others. By helping clients find the “why” behind their financial planning and putting plans in place to achieve their ideal lifestyle, she bridges the gap between generating

business revenue and managing personal wealth.

“Getting on track with personal and business finances begins with the decision to take action,” says Fleming, a fiduciary legally bound to put clients' financial well-being first. “Quality financial planning is not just about risk tolerance; it's about the life clients envision. We discover the life our clients want to experience, create their financial plan around their end goals, and use money as a tool to get them where they ultimately want to be.”

When it comes to finances, Fleming notes that anticipating often unforeseen circumstances can help deter major financial mistakes. She avoids pitfalls by creating a comprehensive financial roadmap to avoid losses, improve accumulation, and protect assets.

“When clients are sitting in front of me and we're going over their numbers, they often stop the conversation to say, ‘You really care about us. Thank you so much for helping us with this part of our financial picture,’” shares Fleming.



The author of *Financial Blindspots!*

The business owner's guide to creating and managing personal wealth without sabotaging business success. Get your copy on Jamie Fleming's website:
FlemingAndAssociatesLLC.com

Book a Discovery Session Today!
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