Capabilities Statement

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Hillspring Financial, Inc.
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Government Codes

NAICS	523930
CAGE	7FA57
DUNS	022355006
SIC	6282
Set Asides	Small Business

Certifications

Hillspring Financial, Inc. is a Registered Investment Advisory Firm (RIA) with the Securities Exchange Commission (SEC).

Kent Forsey, President, is a Certified Financial Planner (CFP) by the Certified Financial Planner Board of Standards, Inc.

Business Summary

Hillspring Financial, Inc. provides personalized confidential financial planning and investment management to businesses and individuals, pension and profit sharing plans, trusts, and estates. Consulting includes determining financial objectives, identification of financial problems, cash flow management, tax planning, insurance review, investment management, education funding, retirement planning, and estate planning.

Areas of Expertise

- 401K and 403B management
- Retirement Planning
- Asset allocation through managed plan option models
- Effective risk management
- Individualized investment strategy
- Retirement planning

Capabilities

- Independent firm with no proprietary investment products to sell
- Fee-based company
- Unbiased financial and investment advice
- Scientific process to maximize expected return at a specific level of risk

Principal Owner

Kent G. Forsey, CFP, President of Hillspring Financial, Inc. began his formal education at the University of Utah and graduated from Brigham Young University with a Business degree, majoring in Finance with a minor in Economics. With over 30 years experience he has taught many seminars and classes on various investment topics including the principles of successful investing and risk management techniques.