Financial Planner Services

IN WICHITA KANSAS

Are you looking for help planning for your future? Tejeda Financial is your partner that makes financial planning simple and, dare we say, fun. Angie Tejeda, MBA MRFC, is an independent financial planner in Wichita, KS with more than 20 years of experience. She's passionate about educating her clients, building personal relationships and helping others pursue their goals. If you're looking for a financial advisor who listens to you and cares about your needs, set up a complimentary consultation today.

EMPOWERING YOU TO PURSUE YOUR FINANCIAL GOALS

> "I am a consultant, not a dictator. My goal is to empower you to confidently plan for your future."
> *–Angie Tejeda, MBA MRFC*

Advisory Services

Angie can help you **plan for all financial aspects of life** – even ones you may not have thought of. Our financial advisory services include wealth management, financial planning, tax planning, education planning, estate planning, retirement planning and more.

Learn More >

Securities America Form CRS >

Our Difference

As a **woman-owned financial planning firm in Wichita, Kansas**, we understand that it can be intimidating to hire a financial advisor, especially for women. Our goal is to **connect** with our clients and make them **feel comfortable**. When we work together, it's a **partnership**. Angie **equips you** with the answers you need to **make educated decisions** about your financial future.

Learn More >

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Who We Serve

At Tejeda Financial, we serve a broad range of individuals, couples and small businesses. They're men and women of all ages. Some are parents, grandparents or empty-nesters while some are child-free. They may be single, married, widowed or divorced. We work with high-net-worth clients as well as retirees, working professionals, business owners and executives. Above all, we treat all of our clients with dignity and respect.

We're Here For Every Stage Of Life

- Retirement
- Changing jobs
- Divorce
- Having a baby
- Buying a house
- Death
- Marriage

NEWS & HAPPENINGS

CAREER WOMEN READY TO CONNECT AGAIN

Like others participating in the Wichita Business Journal's upcoming Career Women program, Veronica Stuart says she's looking forward to surrounding… Read More

WOMEN WHO LEAD: AN INTERVIEW WITH ANGIE TEJEDA

The following is an interview with Angie Tejeda as part of a larger piece published by the Wichita Business Journal… Read More

2018 WOMEN IN BUSINESS

The following is an interview with Angie Tejeda as part of a larger piece published by the Wichita Business Journal… Read More

Contact Us
316-721-5191
1000 N Tyler Rd Suite 300
Wichita, KS 67212
Contact Us
For Clients

Financial Services

WICHITA FINANCIAL ADVISING & PLANNING

As an **independent financial advisor in Wichita**, Angie Tejeda offers thousands of nonproprietary products and services to help you pursue your goals. We take the time to **get to know you and your unique situation** so we can **tailor a solution customized to your needs**.

Retirement Planning Services

Enjoy confidence with a solid retirement savings plan. Retire when and how you want.

LEARN MORE >

Education Planning Services

As a parent, you already know college tuition costs continue to rise. We can help you get prepared.

LEARN MORE >

Tax Planning Services

You don't have to dread tax time. Our effective tax planning strategies help you manage your cash flow and potentially lower your taxes.

LEARN MORE >

Estate & Legacy Planning

Do you know what happens to your assets after your death? Make your wishes known with our guidance.

LEARN MORE >

Financial Planning Services

What if you could have a realistic plan to strive to make your financial goals reality? We can help you do just that.

LEARN MORE >

Wealth Management Services

Your experienced wealth management partner who can help you grow and manage your hard-earned money.

LEARN MORE >

Education Planning Services

PREPARING FOR THEIR FUTURE

As a parent, **you already know** that college tuition costs continue to rise, but **you can still prepare** with experienced education planning services from Tejeda Financial.

Wondering How To Pay For College?

It's no secret that college is expensive. We're often contacted by parents or grandparents who are concerned about how they'll pay for tuition, especially for multiple children. **The truth is**, starting early and working with an experienced financial planner like Angie Tejeda can help make **higher education costs more manageable**.

Wichita Education Planning

As a personal financial advisor in Wichita, Angie Tejeda, MBA MRFC, can help you develop a **smart plan** for your child or grandchild's educational expenses. She'll **guide you** in researching costs to **determine how much you'll need to save**. Then, she'll recommend a **tax-efficient savings plan** to pursue your goal.

Smart Planning For Tuition Costs

Even **small savings can add up** if done consistently, especially when you start while your child is young. One popular option is a Coverdell Education Savings Account, which offers **tax deferrals** for both earnings and withdrawals. If you plan to make larger contributions, a 529 savings account allows for **tax-free savings**.

Why Work With Tejeda Financial

It takes years to save for higher education expenses. You can **count on Angie to be your partner every step of the way**. In fact, she has worked with some client families for **two or even three generations**! Angie works as **a consultant, not a dictator**: as an independent financial advisor, she'll **recommend** the best products for your needs and then you'll choose the ones that work best for you. Education planning with Tejeda financial is all about **you and your goals**.

Get Started! >

Contact Us

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For Clients

Estate & Legacy Planning

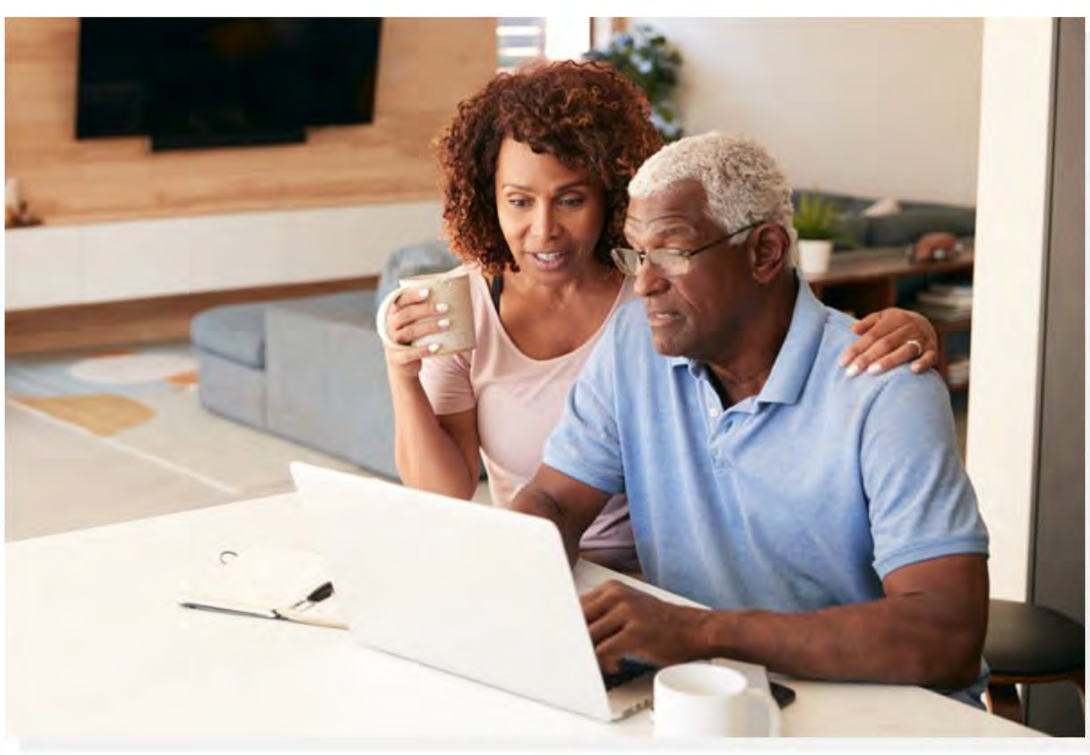
CONFIDENCE FOR THE FUTURE

Do you know what will happen to your assets after your death? It's a difficult question to think about, but estate and legacy planning is **essential** for making sure your wishes are known and respected.

Answers To Tough Questions

Estate planning helps answer difficult questions, so you **have confidence**:

- Will my beneficiaries receive the assets I want them to have?
- What happens if I'm unable to make financial decisions on my own?
- Should I create an advance health care directive?
- Will my beneficiaries have to pay taxes on their inheritance?
- Do I need a will?
- Should I set up a trust?



What Is An Estate Plan?

An estate plan is **a document that outlines how you want your wealth and assets** (real estate, cash, etc.) **to be transferred to your heirs or distributed after your death.** The plan could include charitable giving or strategies to reduce estate taxes for your beneficiaries. A sound estate plan will **protect your loved ones** from the anxiety and stress of a lengthy probate process.

Wichita Estate & Legacy Planning

Angie Tejeda, MBA MRFC, is a Wichita financial advisor who can help you create a plan to **protect your legacy** and provide for your loved ones. **You don't have to be wealthy to create an estate plan.** If you have retirement accounts or insurance policies, you own real estate or have your own business, Angie can provide the estate planning **answers and guidance** you need.

When To Use An Estate Planner

No one knows what tomorrow will bring, so **it's always a good time to plan for your future**. There are a few **key events** that often prompt people to consider planning their estate:

- Birth of a child
- Marriage
- Divorce
- After a spouse's death
- When wealth or assets have accumulated

How Estate & Legacy Planning Works

The estate and legacy planning process begins with a **review** of all of your assets. Then there's a discussion of your **goals** and your **wishes** for how your property should be distributed after your death. The discussion **may also include** the types of insurance and coverage amounts you need. Finally, your financial planner will **recommend** tax-efficient wealth-transfer strategies to pursue your goals.

These could include:

- Establishing an estate
- Creating a will
- Trust setup
- Naming Beneficiaries
- Naming Guardians
- Naming Conservators
- Wealth-transfer strategies
- Reduce estate taxes
- Selecting investments
- Advance directives
- Healthcare power of attorney
- Financial power of attorney

Angie Tejeda is not an attorney and cannot provide legal advice. We do work with Wichita estate planning attorneys when needed.

Why Work With Tejeda Financial

The truth is, estate planning is a difficult subject. Angie recognizes this, and her **compassionate and caring** manner will help you **feel comfortable** discussing delicate issues. She can help **work through tough decisions** such as how to handle beneficiaries for blended families. With **more than 20 years of experience** helping multiple generations of clients, Angie can help you **clarify** which assets should be included in your estate plan. She is dedicated to providing you with **knowledge** to make educated decisions so **you can feel confident in your choices.**

Contact Us >

Financial Planning Services

PROFESSIONAL GUIDANCE TO PURSUE YOUR GOALS

What if you could have a **realistic plan** to **strive to make your financial goals reality**? Angie Tejeda, MBA MRFC, provides skilled financial planning services in Wichita to help you do just that.

Clear Answers To Your Money Questions

Everyone's financial situation is unique, but **the truth is** some money goals and questions are universal:

- Can I afford to buy a home?
- How can I save for that big vacation?
- Am I saving enough for my child's education?
- How can I preserve my assets as I age?

Wichita Financial Planning Services

Tejeda Financial is an experienced Wichita financial planning company dedicated to **helping you develop an effective plan pursue your financial goals**. If you've never worked with a financial planner before, it may seem intimidating. But Angie makes the process **simple and engaging**, so you feel like **you're working with a friend who cares**.

Financial Planning For Women

As a female financial planner, Angie is keenly aware of the importance of **empowering and educating women to take charge of their finances**.

Widows and newly divorced women often face **overwhelming decisions and questions** about their new financial status. There is a **fear of running out of money**. If the husband handled all of the finances, **the widow may not even have a clear picture of where she now stands financially**.

Divorced women face their own set of challenges, with the division of assets and a financial picture that may include alimony or child support. Whatever the situation, **Angie uses her compassion and teaching spirit to help her clients navigate these new waters**.

Customized Steps To Pursue Your Financial Goals

- Major purchases
- Paying for college
- Saving for retirement
- Estate planning
- Tax planning
- Investments
- Real estate
- Insurance review
- Charitable gift planning
- Net worth/portfolio analysis

How Financial Planning Works

A financial planner takes a holistic approach to reviewing your **entire financial picture**. This includes **assets** like your home, car, checking and savings accounts. Your financial advisor will discuss your **goals**, such as buying a house, saving for a wedding, planning for the financial impact of death or another major life event, and more. This information will be used to create a **personalized plan** with **actionable steps you can use to pursue your financial goals**.

1. Evaluate your current overall financial situation
2. Gather data and inventory assets asset
3. Set goals
4. Develop a financial plan to address those goals
5. Implement recommendations
6. Review and revise

Why Choose Tejeda Financial

Tejeda Financial **empowers you to pursue your financial goals**. We act as **consultants, not dictators**. We're here to provide **advice and education**, but ultimately the decisions are up to you. Angie takes a personal interest in her clients and has developed **lasting relationships** with them over the past 21 years. In fact, **some of her clients have referred their children and grandchildren**! Financial planning with Tejeda Financial is **all about you** and your goals.

Contact Us >

Our Difference

WHY WORK WITH TEJEDA FINANCIAL

When you work with Tejeda Financial, **you'll feel empowered to take charge of your financial future**. Our difference is in our approach: we're consultants, not dictators.

Holistic Wealth Management & Financial Planning

We take a holistic approach to wealth management and financial planning. Owner Angie Tejeda, MBA MRFC, will **get to know your entire financial picture** before helping you **develop a plan** to help you get where you want to go.

Consultative Approach

Angie sees herself as **a consultant, not a dictator**. When you work with Angie, it's a **partnership**. She equips you with the information you need to make **educated decisions** about your financial future.

HERE WHEN YOU NEED US

Wealth management is a process, not a product, so we provide ongoing money mentoring and coaching. When you have questions or your situation changes, we're here for you.

Education

Tejeda Financial is **committed to educating both its staff and its clients**. Angie often draws concepts on the board to help clients better understand their financial situation. As a company, we also complete a minimum of 30 hours of continuing education each year. This is more than twice the industry average, but it allows us to **serve you with the latest financial products, services and tax strategies**.

Efficient And Productive

We've **refined** our systems, procedures and techniques **through years of experience**, making us an efficient and productive wealth management company.

BrokerCheck by FINRA

Independent

As an **independent financial advisor**, we do not offer proprietary products. We're able to work with you in the way that best meets your needs. That means we can offer you competitive wealth management and financial planning products and services.

Client Connections

Every financial advisor says they're focused on client relationships, but few truly form bonds with their clients. Angie likes **building personal connections** with her clients because it helps her to **better understand their needs**.

Experienced Advisor

Tejeda Financial has been in business for more than 20 years and has the honor of working with multiple generations and family referrals.

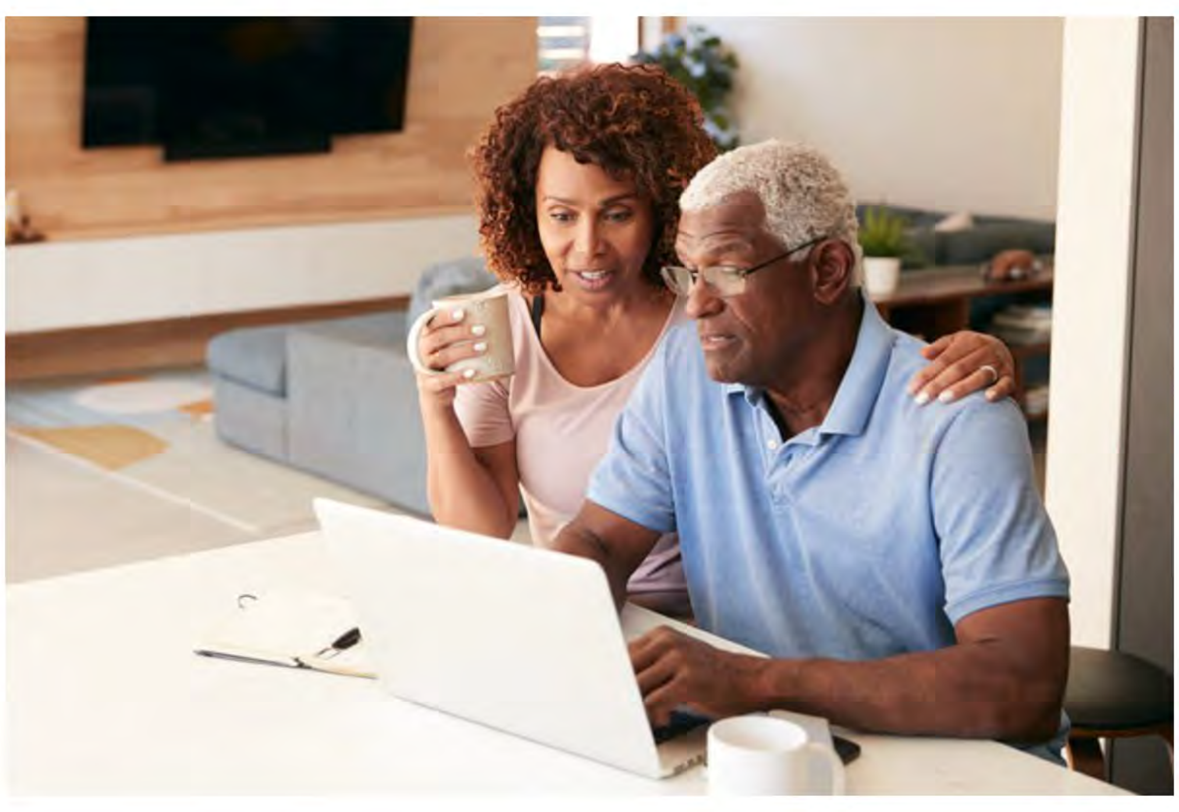
Retirement Planning Services

PREPARE FOR THE RETIREMENT YOU WANT

Enjoy confidence with a solid retirement savings plan. Tejeda Financial provides retirement planning services in Wichita, KS to help you retire when and how you want.

Answers To Your Retirement Questions

- "When should I start saving for retirement?"
- "Am I saving enough for retirement?"
- "How much money do I need to retire?"
- "When should I start taking my Social Security benefits?"
- "What happens to my retirement accounts when I turn 72?"



Wichita Retirement Planner

Unfortunately, most people aren't saving enough for retirement. That's why retirement planning is so important. At Tejeda Financial, we encourage our clients to **start thinking and saving for retirement early** in their working lives. As an experienced Wichita retirement planner, Angie Tejeda can **simplify planning** for early retirement, **evaluate your saving strategy** as you near retirement age, and even **offer strategies** once you've retired.

Retirement Planning For Women

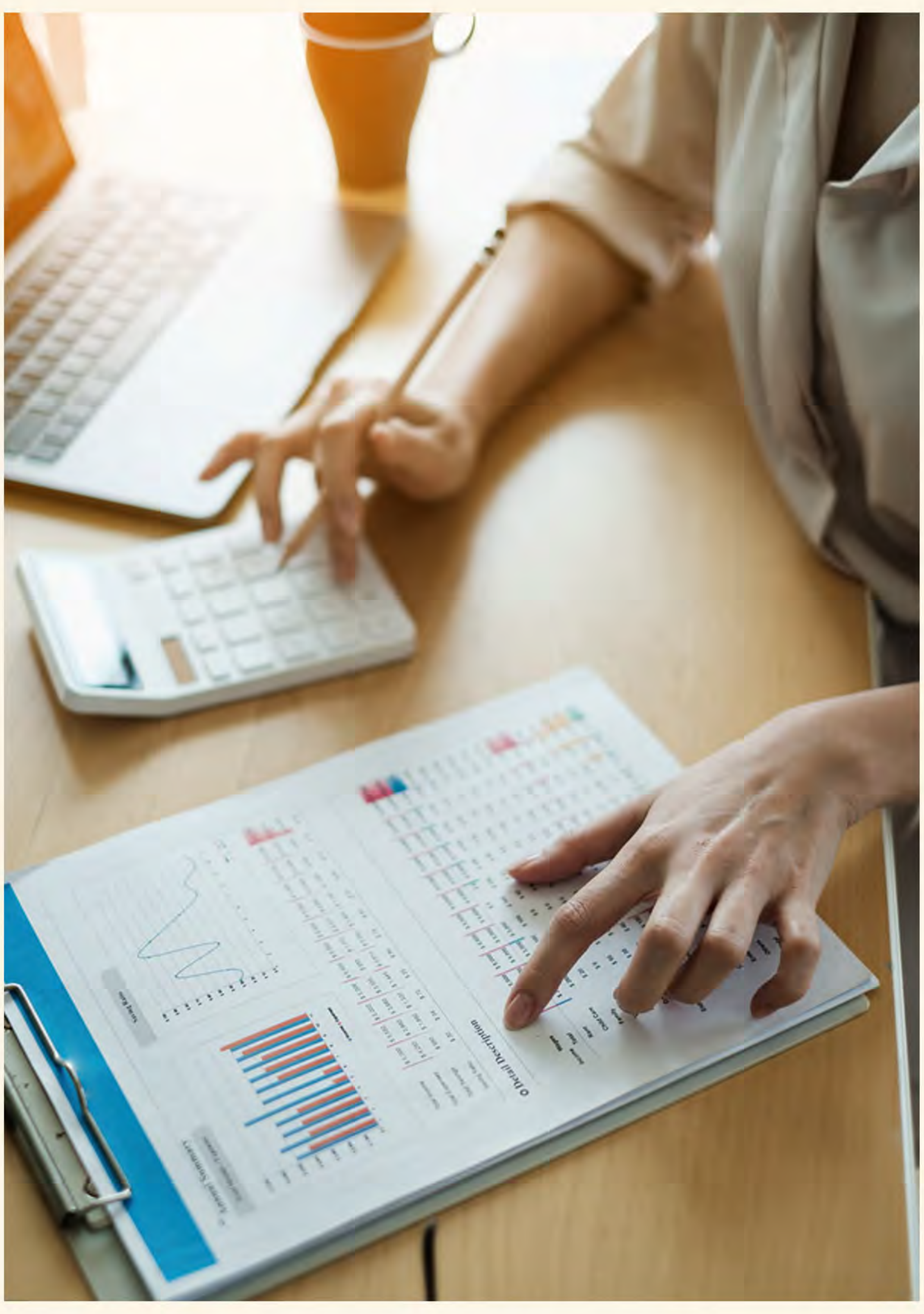
At Tejeda Financial, **we focus on helping women plan for retirement**. We want you to **feel comfortable** asking questions, and we're here to help you **make informed decisions** about when and how to save for the retirement you want.

Personalized Retirement Planning

Even if you participate in your employer's 401(k) or other retirement program, **you have other savings options**. Investments, pension plans and individual retirement accounts (IRAs) can all be used to fund your retirement. Tejeda Financial will **evaluate** your current financial situation and then present you with options that may **help you retire with the income you want**.

Retirement Planning Process

1. **Evaluate your current age and the age you expect to retire.** This tells us how many working years you have left so we can assess your level of risk tolerance. In general, more aggressive investments are favored in the younger years and more conservative options are best as retirement age approaches.
2. **Define how much you will need to retire.** Here's where we'll look at both your current and expected income and expenses. We'll also take into consideration things like inflation and where you plan to live.
3. **Set goals and prioritize them.** For most clients, retirement is one of several savings goals. Angie will help you develop a strategy for saving for retirement while accomplishing other goals such as paying down debt or paying for a child's education.
4. **Decide where to save and invest.** You'll receive personalized recommendations for a mix of retirement investments and accounts to help you pursue your goals. A good place to start is with your employer-sponsored retirement plan, if applicable, especially if they match contributions. Your custom retirement savings plan may also include a Roth IRA, traditional IRA, self-directed IRA, Simple IRA, SEP IRA, depending on your situation.



Why Choose Tejeda Financial

At Tejeda Financial, **we're consultants, not dictators**. You can **count on us** for professional guidance and answers to your questions, but **you're free to make the decisions** you feel comfortable with. Angie Tejeda, MBA MRFC, has more than **20 years of experience** helping clients plan for post-work life. She focuses on **building personal relationships** with her clients to get to know their overall financial picture. Angie will thoroughly review your retirement goals before recommending a **customized plan** that works for your individual needs.

Contact Us >

Tax Planning Services

STRATEGIES FOR REDUCING PERSONAL & BUSINESS TAXES

You don't have to dread tax time. Tejeda Financial provides effective tax planning strategies to help you manage your cash flow and **lower your taxes** so you can **address your financial goals**.

What's Your Tax Strategy?

Have you ever **wondered** if you're paying more income tax than you should? Are you **concerned** about taxes whittling away at your retirement income? Do you **worry** about underpayment penalties for estimated taxes on your business? With a solid tax planning strategy, **you don't have to**.

Wichita Tax Planning

If you're looking for ways to **lower** your income taxes, **reduce** estate taxes, **make the most of** your retirement funds, **effectively** finance your child's education and more, **Tejeda Financial can help**. As a Wichita tax planning firm, we'll recommend strategies to:

- Increase tax savings with available tax credits
- Reduce capital gains tax
- Avoid underpayment penalties for estimated taxes
- Manage your cash flow
- Protect income from taxes
- Business tax planning
- Year-end tax planning
- Estate tax planning strategies
- Retirement tax planning

Angie Tejeda is not a Certified Public Accountant (CPA) and cannot give tax advice.

She does work with CPAs in Wichita who can provide assistance with complex tax situations.

Customized Tax Planning Strategies

Tax planning is a **key component** of an effective financial strategy, and there is no one-size-fits-all solution. At Tejeda Financial, we take the time to **understand your unique situation** before providing recommendations. **Your individual tax strategy may include** insurance, investments, charitable giving planning, retirement and education savings. When you're looking for ways to lower your taxes, count on us for:

- Tax planning strategies for high income earners
- Tax planning strategies for individuals & families
- Tax planning strategies for business owners

Why Work With Tejeda Financial

Angie Tejeda, MBA MRFC, is an **experienced financial** advisor in Wichita providing tax planning for individuals and small businesses. She is your **go-to resource** for efficient strategies for state and local income taxes, property taxes, mortgage interest, small business taxes, business equipment purchases and more. Angie takes an educator approach to **empower** her clients with knowledge, often drawing financial and tax concepts on the board. She is **a consultant, not a dictator**, so you can make the decisions that work best for you. And with **more than 20 years of experience**, Angie has helped clients navigate a wide range of tax situations.

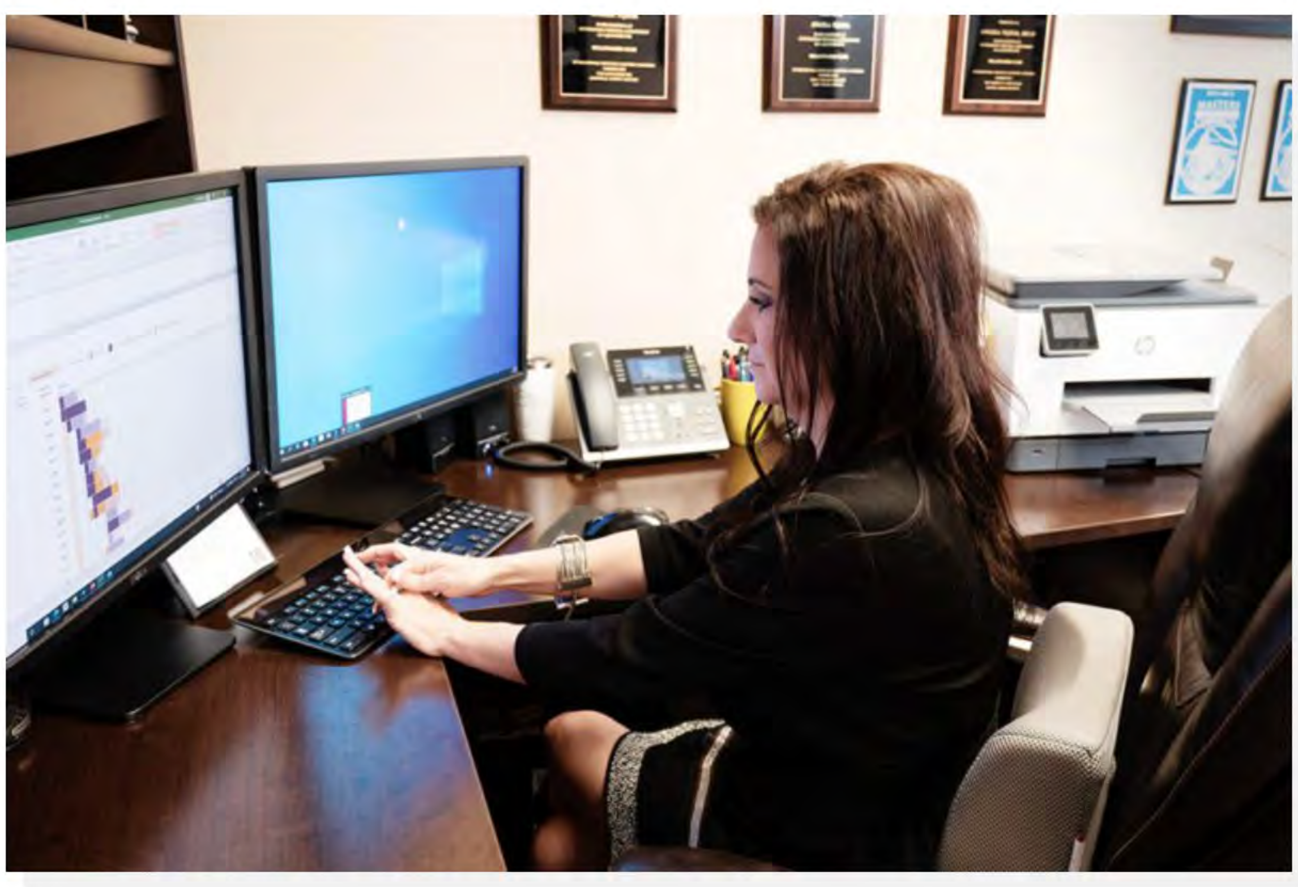
Contact Us >

Wealth Management Services

GROW AND MANAGE THE MONEY YOU HAVE

Wichita Wealth Management Advisor

Angie Tejeda, MBA MRFC, is a **experienced wealth management advisor in Wichita**. She not only helps you manage the money you have, but also to build **custom strategies for growing your wealth**. Angie is **your professional resource** for investment portfolio management, wealth planning advice and more.



Wealth Management For Women

As a **female financial advisor**, Angie is especially sensitive to the needs of women executives and those who are divorced or widowed. Wealth management is a male-dominated industry, yet women control more than 50% of the wealth in the United States. Angie provides a level of **compassion and energy that puts female clients at ease**. When you work with Tejeda Financial, **you will be heard and feel empowered**.

How Wealth Management Works

Wealth management encompasses **all of the financial aspects of your life**. After we **evaluate** your current cash flow and assets, we provide **financial strategies and recommendations to help you pursue your goals**. We'll work with you on an ongoing basis to **monitor and manage** your investment portfolio, offer **guidance** for dealing with changing market conditions and more.

- Cash flow analysis
- Income preservation and growth strategies
- Retirement savings and withdrawal strategies
- Tax planning strategies
- Estate planning
- Education savings strategies

Why Work With Tejeda Financial

With **more than 20 years of industry experience**, you can **count on Angie Tejeda** for solid wealth management strategies. She takes a **teaching approach** to help her clients understand and **feel confident** in their financial decisions. At Tejeda Financial, **we're consultants, not dictators**, so you have the **freedom** to make the choices that work best for your goals. Angie takes a personal interest in her clients in an effort to understand their what's truly important to them, **building relationships that span decades**. In fact, she is an **advisor to second- and even third-generation clients**.

Contact Us >

Who We Serve

OUR FINANCIAL PLANNING & WEALTH MANAGEMENT CLIENTS

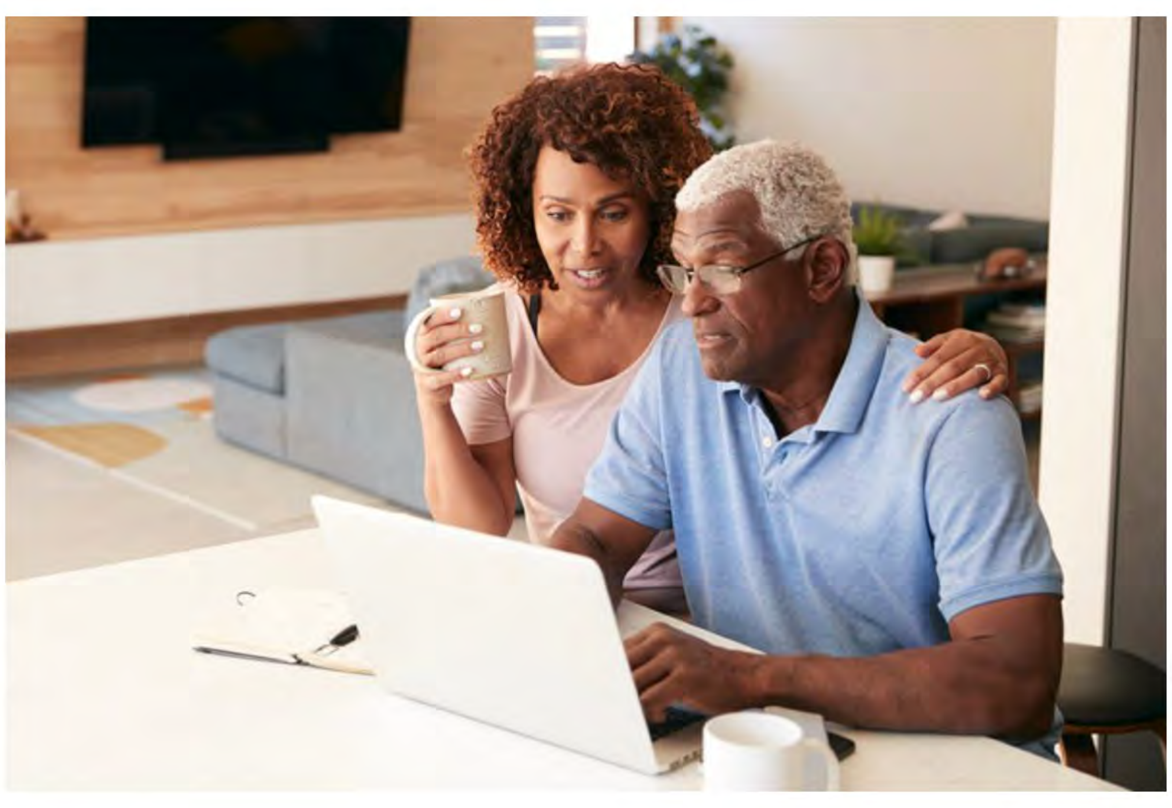
Whether you're planning for a major life event or a big purchase, it helps to have **a clear path to pursue your goals**. At Tejeda Financial, we serve a wide range of personal and business clients with **professional financial planning and wealth management** services.

Individuals & Families

There are a multitude of reasons an individual or couple may seek out a financial advisor. One important thing to keep in mind is that **you don't need to have a lot of money to work with a financial planner**. Our job is to help you plan and save to grow the money you have so you can **pursue your goals**.

Your Partner Through All Stages Of Life

Angie likes to be involved in her clients' lives beyond just their finances. **Financial planning is often tied to life events** like marriage, divorce, retirement and raising children. Having a clear picture of your overall life helps her **understand your unique situation** so she can **better anticipate your needs**.



We're Here To Help With

- Investment analysis
- Protecting assets in the event of death
- Planning to buy a house
- Rolling over a 401(k)
- Financial impact of having a baby
- Saving for a big vacation or a wedding
- Tax planning
- Wealth management

Women

You may be surprised to learn that women control 51% of the personal wealth in the U.S. Widows and single women often face unique challenges when it comes to money management, **yet financial planners often focus on serving men**. As a woman-owned financial planning and wealth management firm in Wichita, Kansas, we frequently work with women who are single, newly divorced or widowed. **We are here to listen and to empower you to confidently plan for the future.**

Retirees

Whether you want to create a plan to **retire early**, you're approaching retirement and want to ensure you've **saved enough**, or you want to have **as much retirement income as possible**, we're here to help. Angie Tejeda offers tax-efficient retirement planning strategies to help you plan for the post-work life you want.

Executives & Professionals

We assist high net worth clients with charitable giving planning, asset allocation, investment management, estate planning, tax planning, portfolio analysis and more. Our holistic wealth management services strive to help you **grow and manage your money**.

Business Owners

A financial advisor can help small business owners, sole proprietors and contractors manage the money they have and **plan for taxes and company growth or expansion**. Angie Tejeda provides efficient business tax planning strategies in Wichita, Kansas.

About Tejeda Financial

WICHITA INDEPENDENT FINANCIAL PLANNER

Tejeda Financial is a woman-owned financial planning firm in Wichita, Kansas. Owner Angie Tejeda, MBA MRFC, is dedicated to **empowering others to take charge of their wealth and financial health so they can pursue their goals**.

Background

Angie's mother was a credit union CEO who instilled the importance of money skills in her daughter from a young age. Following in her footsteps, Angie entered the world of finance as a financial advisor in 2000. She helps business owners, individuals and families make their financial goals a reality. **Angie focuses on retirement and pre-retirement planning as well as women's financial planning.**

Angie Tejeda, President

Education

A Goddard High School graduate, Angie graduated from Wichita State University with a bachelor's degree in psychology and a minor in sociology. She then earned her Master's in Business Administration (MBA) from Baker University.

Licenses

- FINRA licenses Series 7 – Full Registration General Securities Representative
- Series 66 – Investment Advisor Representative
- Registered in Arizona, Kansas, Missouri, Colorado, Florida, Georgia, California, Oklahoma, Texas and Hawaii
- Master Registered Financial Consultant (MRFC) by the International Association of Registered Financial Consultants (IARFC)

BrokerCheck by FINRA

Community Involvement

Angie is passionate about supporting and raising money for children's causes in Wichita. Over the years, she has been involved with the Wesley Children's Foundation, St. Anthony Family Shelter, The Make-A-Wish Foundation, Children's Miracle Network and St. Jude Children's Research Hospital.

As a female financial advisor, mentoring other women is also important to Angie. She has facilitated women's empowerment groups in Wichita with speakers from local businesses.

In addition, Angie is involved with her church, St. Catherine's of Siena, and their Sisters of Siena (SOS) program.

Achievements

- 2018 Wichita Business Journal Woman in Business
- 2021-22 Wichita Business Journal Career Women Program Participant

Interests & Activities

Outside of work, Angie enjoys spending time with her husband Ricky and their three children, Calli, Solana and Cisco, and well as her two grandsons, Travis and Ian. Angie's favorite things include flavored coffee, chocolate and her longtime friends.

Contact Tejeda Financial

Take the first step toward pursuing your financial goals. Contact Tejeda Financial today.

Call: 316-721-5191

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Fax: 316-854-5098

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Wichita KS 67212

Get Directions

Hours:

Monday-Friday 9am-5pm

CONTACT US

Name *(Required)*

First

Last

Email *(Required)*

Phone *(Required)*

How can we help you? *(Required)*

Submit