More than Financial Planning. Our comprehensive planning focuses on real life, not just your investments or retirement. It's putting a date to your goals and steering your life based on analysis, giving you choices and alternatives. Our Certified Financial Planners® guide families, executives and business owners through life's transitions and arrange more than just the money aspects of your life. It's about gaining comfort with your long-term financial security.

TOTAL WEALTH PLANNING

A ROADMAP FOR LIFE PLANNING.

We serve as a confidant and sounding board for personal and business decision making. The real benefit is having all the key elements of your financial life in order.

TOTAL SOLUTIONS

- Tax Planning & Reduction Strategies
- Retirement Planning
- Estate Plan Design & Document Review
- Insurance Needs Analysis
- College Planning, Funding and Selection Guidance
- Custom Portfolio Design & Management

CREDENTIALS

- Over 17 years average experience per advisor
- Member of NAPFA, the exclusive organization for fee-only fiduciaries
- Our advisory team holds certifications in areas of CFP®, CPA, MST, CEPA, CTFA, AIF, and MBA

FIDUCIARIES

- As fiduciaries, we are morally and legally bound to act in your best interests at all times.
- Unbiased advice with absolutely no product sales or commissions (i.e., Fee-Only)
- A caring team and firm that knows your family and your entire financial life.

INDEPENDENT AND LOCALLY OWNED

ROB SIEGMANN
MBA - Principal & Chief Operating O cer
rob@twpteam.com

DAVID WILDER
CFP®, CTFA, MST - Principal & Chief Investment O cer
dave@twpteam.com

ROB LEMMONS
CFP®, CPA, AIF - Principal & Director of Financial Planning
rlemmons@twpteam.com

We look forward to serving you | **513-984-6696**

Check out our educational blogs and videos at | **TWPTEAM.COM**