TWINBRIDGE
FINANCIAL CONSULTING, LLC

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FINANCIAL CONSULTING

## Helping Clients Achieve Their Financial Goals

Twinbridge Financial Consulting introduces high net worth clients to prescreened financial managers who are dedicated to growing and protecting assets. Twinbridge develops a long-term relationship with each client as a trusted and knowledgeable financial advocate.

Working closely with clients, we explore financial objectives, risk tolerance, cash flow needs, and time horizons, in order to establish a platform for sound financial recommendations.

*The Manager Screening Process*

Selection of investment managers is based on the characteristics of each proposed firm, using the following criteria:

- Growing as well as safeguarding assets
- Dedication to client service
- Commitment to an investment philosophy
- Investment strategies
- Investment mix and allocation
- Buy and sell disciplines
- Returns compared to a benchmark index
- Performance history over full market cycles
- Research capabilities
- Attention to tax implications
- Reasonable management fees

Twinbridge clients have access to numerous additional resources through strategic partnerships with respected financial managers, accountants, estate and family lawyers, health care specialists, and personal and medical bill-paying professionals.

Generally there is no fee to the client for our services. Standard portfolio management fees apply and are billed by the selected financial institution.

### How We Work With You

Initial meeting to understand your financial objectives

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Twinbridge recommends 2-3 investment managers who are closely aligned with your specific financial goals

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Investment managers and their support teams make presentations

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Evaluate options and select your financial manager

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Seamless transfer of investable assets

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Client and Twinbridge attend regularly scheduled portfolio review meetings

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Twinbridge reviews statements, tracks portfolio performance and monitors the relationship

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Client, Financial Manager and Twinbridge work together as a team to help maintain your lifestyle and secure your financial future

***"Twinbridge is saving me from making the same financial mistakes I've made in the past."***

– Current Twinbridge Client

*Twinbridge Disclosure Statement is available at Twinbridgellc.com and upon request.*