

Twinbridge has several goals, one being to emphasize clients' financial education. Selecting an investment manager can be an overwhelming process and that's where we step in. Our stable of managers strive to build portfolios while helping clients develop their financial confidence. Hosting investment seminars is one way to achieve this goal of economic awareness.

These seminars have featured well-known politicians, economists, and motivational speakers, all leaders in their field. One economist, Larry Kudlow, recently accepted the position of White House National Economic Council Director. Larry has presented his economic expertise to governors, presidents, Washington think tanks and top investment firms, including several of ours!

One client said he had always been reluctant to ask a question during a portfolio review meeting simply because he didn't want to sound ill informed. Fortunately for him and many other clients, it's a **completely** different story today. Twinbridge salutes all of its managers for empowering their clients while building and protecting investments.

THE BOTTOM LINE



**Building your foundation
for financial success.**

Twinbridge helps clients achieve their financial goals through a network of carefully screened managers who are experts in their fields and have dedicated research analysts to support portfolio decisions. Generally there is no fee for the initial consultation and the on-going client services:

- Evaluating your financial long-term and short-term goals,
- Helping you through the process of selecting your financial manager,
- Transitioning accounts and determining a Portfolio Review schedule,
- Reviewing your monthly statements and tracking performance,
- Attending all Portfolio Review meetings with you and your advisor,
- Partnering with you in all areas of your financial landscape.

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