TWINBRIDGE
FINANCIAL CONSULTING, LLC

Partnering with clients to achieve financial goals.

EVALUATE POLICIES & BENEFICIARIES
MAKE THE CALL…

Suggested but Not Exciting
The start of a new year is a good time to look back at the events of the past year and on everything achieved. It is also an important time to make sure your "financial house" is in order. Reviewing insurance policies is not exciting, but the good news is that you might qualify for newly initiated discounts! Additionally, reviewing beneficiary designations is an important part of ensuring that the distribution of your assets follows your intentions.

Review Beneficiary Designations
Too often, people forget to update their beneficiary designations especially after major life events such as marriage, children, divorce, etc. Beneficiaries assigned to certain financial accounts and life insurance policies should be reviewed annually to make sure your intentions are followed.

Evaluate Insurance Policies
This review includes examining health, disability, life, car, and homeowners insurance just to mention a few. With ever changing housing prices, make sure your coverage keeps up with market value. Reassess policies on an annual basis to avoid gaps in coverage. Check to see if you qualify for discounts such as "Safe Driver Program".

Make the Call...
Woody Allen said 80% of success is showing up. Show up by making the call to confirm your insurance coverage and designated beneficiaries remain consistent with your financial goals.

Building your foundation for financial success.

THE BOTTOM LINE

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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