
TWINBRIDGE Welcomes Wendy Cook, CFP®

In an effort to expand client services, TWINBRIDGE proudly announces the appointment of Wendy Cook, CFP® as Marketing Director. Wendy has an impressive 18-year history in the financial industry and will support the team efforts to build and protect clients' investable assets. Additionally, she will direct the marketing efforts including new client development, managing the website as well as social media for the Company.

Prior to joining Twinbridge, Wendy served as Senior Investment Officer at The Haverford Trust Company followed by a 10-year career holding the positions of Institutional Sales and directing back office operations at Radnor Research & Trading Company. Wendy currently holds the CFP® and Series 7, 24, and 66 designations.



Wendy Cook, CFP®

An honor graduate and dual athlete from University of Richmond, she is active in the non-profit community, St. David's Episcopal Church and holds the position of Director of Communications for the Devon PTO. She also serves as captain of the Merion Cricket Club field hockey team. Wendy lives in Wayne, PA with her husband and four sons.



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:

Building your foundation
for financial success.

- 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.

The information contained herein has been obtained by sources believed to be reliable but is not necessarily complete and is not guaranteed. This is prepared for general informational purposes only and does not have regard to the specific investment objectives, financial situation or particular needs of any person who may receive it. Views are subject to change without notice. Twinbridge Disclosure Statement is available upon request.