TWINBRIDGE
FINANCIAL CONSULTING, LLC

Partnering with clients to achieve financial goals.

NEW SERVICE: PERSONAL MONEY MANAGEMENT
WE MAKE HOUSE CALLS!

Twinbridge is pleased to announce the additional service of providing personal money management. More and more requests have been made to add this valuable service for current clients as well as those outside the Twinbridge financial network. As money matters become more time-consuming, individuals seek the peace of mind knowing that their bills are paid on time, bank and brokerage statements are reviewed and balanced to the penny! Organizing personal finances allows you to have more free time, while ensuring nothing falls through the cracks.

Twinbridge Money Management includes:

- Bill paying online and by mail,
- Checkbook balancing,
- Cross checking brokerage statements,
- Organizing and filing financial statements (digitally or hard copies),
- Making bank deposits - online, in person or by mail,
- Gathering tax documents and receipts for April 15th,
- And when needed, providing Notary Services.

Please call to set up an in-home appointment to evaluate your or a family member's individual money management needs.


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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