TWG Wealth Planning

Together We Grow

2020 Overview

TWG Wealth Planning – Together We Grow

Our Mission

TWG Wealth Planning is a Financial Management and Investment Services firm. We believe every meaningful relationship in life needs growth. We work with clients who are committed to their personal financial growth. Together We Grow.

Client Profile

TWG Wealth Planning primarily works with clients who exhibit the following traits and characteristics:

- Wants to spend more time with family
- Wants to spend more time on their passions or hobbies
- Wants to spend more time having fun
- Wants to have a professional to serve as their personal CFO
- Wants to be accountable for their goals
- Wants to work with someone who they trust and like

Our Talent and Capacity to Serve

TWG Wealth Planning Leadership

Jeffrey Kochan, CFP® - Experienced wealth planner with focus on insurance, investments, and tax planning. Strategic leadership over a team of advisors, each specializing in their studied field to help clients meet their objectives. Successfully identified and opportunities and completed X acquisitions of financial practices.

John Davila – Experienced Financial Advisor who focuses on client goals and needs. Developed expertise in the niche markets of clients: Women Decision-Makers (women business owners or women financial decision makers for the household or office) and The Emerging Family (couples 10-15 years from retirement with young children). Leads the firm in developing marketing events and campaigns.

TWG Wealth Planning Team

Janet Birruete
Operations

Lindsay Zollers
Operations

Adam Kadivar, CFP®
Financial Planning

Tom Kim
Director of Financial Services

Key Relationships

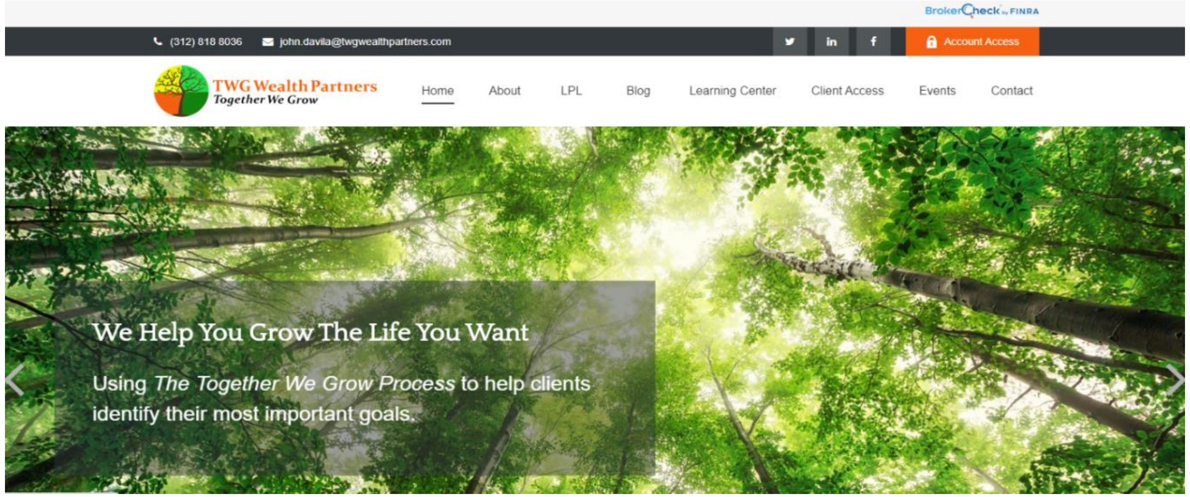
Madison Miller
Virtual CMO at LPL

Leon Ying
Virtual CFO at LPL

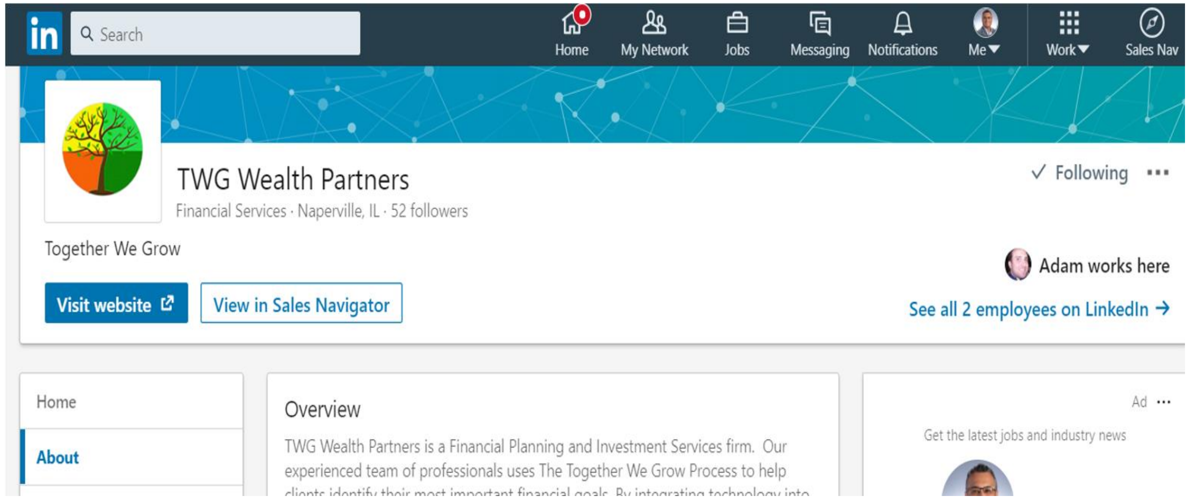
Marketing and Brand Awareness

The components of the TWG Wealth Planning Brand include: online presence, interactive technology, events and the Together We Growth Process for client engagement.

Our Multi-Platform Presence

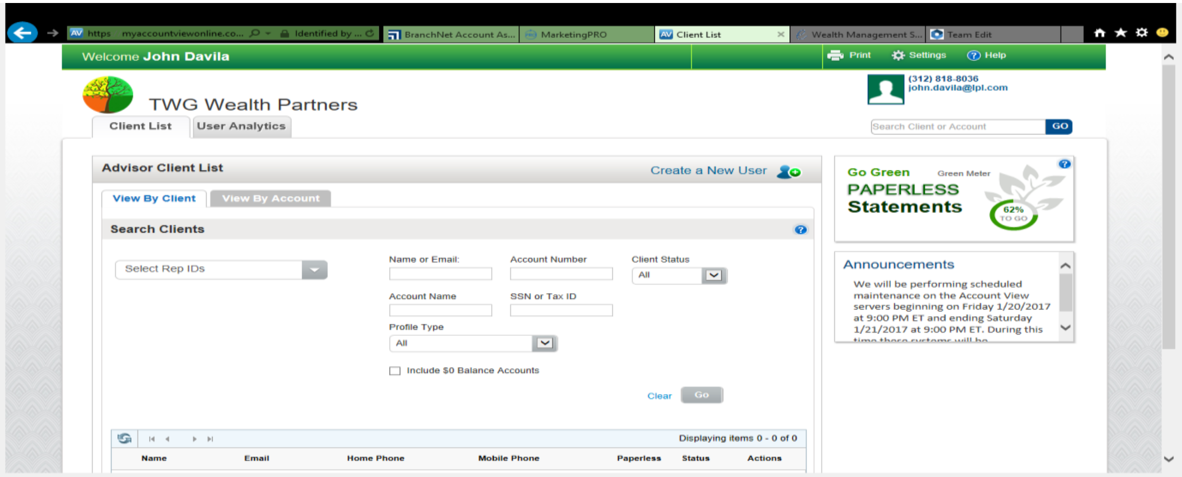


- TWG Wealth Planning website: www.twgwealthplanning.com



- LinkedIn Page, https://www.linkedin.com/company/twgwealthpartners

- Facebook Profile: https://www.facebook.com/twgwealthpartners/

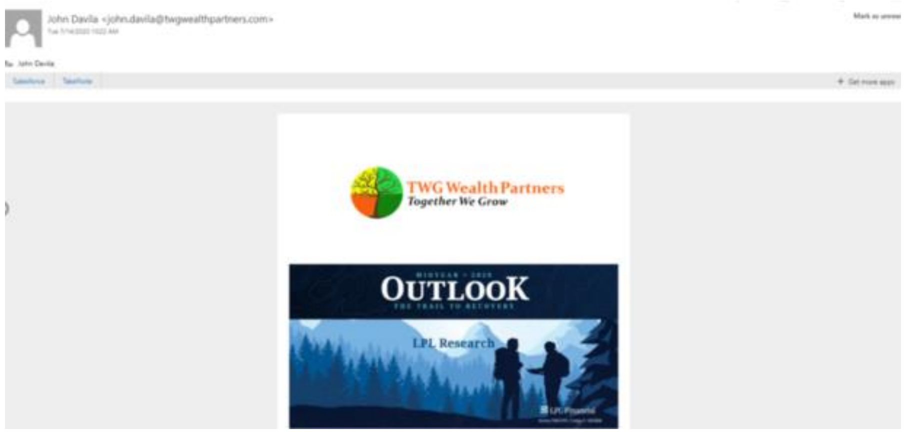


- AccountView – LPL Financial online account access for clients branded with TWG logo

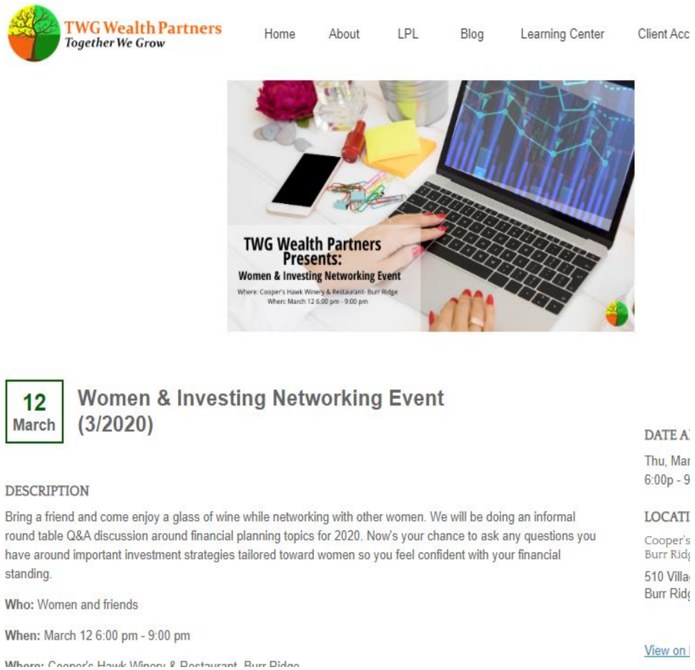
Interactive Technology to Reach our Clients

Interactive Presence – TWG Wealth Planning' interactive presence with clients include the following:	
Social Media and Email Marketing Campaigns (in collaboration with LPL Chief Marketing Officer)	in f
Riskalyze – Investment risk questionnaire branded with TWG logo	riskalyze
Zoom – Virtual meeting room branded with TWG Wealth Planning	zoom

Other Technologies include:	
CRM System	REDTAIL
Website	fmgsuite
Financial Planning	MoneyGuidePro RightCapital
Research	Fi360



Client-Driven Events



Women & Investing Networking Series

Emerging Families Events

Past events included private screening of Toy Story, Breakfast with Santa, and two Virtual Concerts for kids.

Critical Client Communication

Zoom Q&As sessions on March 11 and continued periodically through the end of April

TWG Process

TWG Wealth Planning Brand has allowed the marketing of client engagement as the ***Together We Grow Process***. Although each advisor has their own process, the brand allows us to differentiate our process from other advisors.

Checklist of Items to Address

The tasks that need to be completed are the following:

- Complete Buy/Sell Agreement
- Integrate our Operations personnel for your transition
- Integrate client data over to Redtail
- Ensure all licensing is symmetrical for VAs
- Complete DBA and submit to LPL Financial's Marketing Compliance for approval
- Complete email signature and submit to LPL Financial's Marketing Compliance for approval
- Complete business cards and submit to LPL Financial's Marketing Compliance for approval
- Obtain professional profile for use on website
- Announcement letter to clients
- Add TWG Wealth Planning to your LinkedIn profile
- Invite Facebook clients to like TWG Wealth Planning
- Add logo and brand information to your AccountView portal in ClientWorks
- If you currently maintain a financial planning program, add logo and brand information
- Add logo and brand information to your Riskalyze portal

We can help you process these bullet-points as we have built templates for most of the above items.
Our goal would be on-board you efficiently and effectively.