

Client Profile

TandemGrowth is an independent, fee-only wealth management firm offering comprehensive financial planning and custom asset management to a diverse client base of business professionals.

Individuals Who Most Benefit From Our Services

- Individuals wanting to develop a **comprehensive plan** to organize all areas of their financial life
- Individuals planning for their **transition** into **retirement**
- Individuals faced with the challenges of **distribution planning** in retirement
- Individuals needing advice on the financial implications of a **career change**
- Business executives needing advice on the complexities of their **stock option portfolio**
- Parents and grandparents concerned about funding **higher education goals**
- Individuals concerned about the effectiveness of their **investment programs** - risk, cost, performance
- Individuals with **concentrated portfolios** looking for ways to **reduce risk** in a tax-efficient manner
- Families seeking to **preserve wealth** for future generations - **estate planning**

*Partial listing of companies whose employees we serve:

Alumax, Inc., AT&T, BellSouth Corporation, Choicepoint, Eli Lilly & Company, IBM, Kimberly Clark Corporation, Siemens, The Home Depot, The Coca-Cola Company, United Parcel Service (UPS), Yahoo!

*It is not known whether the listed companies/clients approve or disapprove of the adviser or advisory services.



TANDEM GROWTH
FINANCIAL ADVISORS, LLC