



# TANDEM GROWTH

Financial Advisors

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WEALTH ADVISOR + PRESIDENT

Jeff has been providing personalized financial advice to individuals and families since 1986. He is passionate about sharing his experience and expertise in the community.

If your organization would like a dynamic and engaging speaker, Jeff welcomes the opportunity to be a resource.

## SPEAKING TOPICS

AVAILABLE VIRTUALLY!

### THE 6 QUESTIONS YOUR FINANCIAL PLAN SHOULD ANSWER

Explore the questions an evolving, holistic financial plan will answer

### MONEY AND MEANING

Creating a strategy for post-career meaning and significance

### BEHAVIORAL INVESTMENT COUNSELING

Focus on what you can control and be a more relaxed investor

### GUIDE TO THE MARKETS REVIEW

Comprehensive insights on the market based on independent research

### WHAT AN INVESTMENT PROFESSIONAL CAN DO FOR YOU...AND WHAT THEY CAN'T

What to know before beginning a relationship

### INCOME INVESTING: IT'S NOT WHAT YOU'VE BEEN TAUGHT

Creating a rising income for life: the only "sane" retirement strategy

### EVIDENCE-BASED INVESTING

A transparent investment approach backed by decades of empirical research

The above is a sampling of topics. A custom presentation can also be designed. Engagements can be as short as 20 minutes to as long as 50 minutes depending on the host's needs.



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