



TIMBERCHASE FINANCIAL
COMPREHENSIVE WEALTH MANAGEMENT

Menu of Presentations

- **Our core wealth management presentations:**
 - An Informed Investor: Five key concepts for investing success
 - Wealth Enhancement: Tax planning now and in the future
 - Charitable Giving: Simple ways to give while you are alive
 - Wealth Protection: Great fences make great neighbors - protecting your wealth
 - Wealth Transfer: Estate planning mistakes - a legacy you don't want to leave

- **Women in transition:**
 - What To Do Now: Getting the help you need after the death of a spouse
 - Sudden Wealth: Managing proceeds from an inheritance, insurance settlement, or the sale of a business

- **Retirees:**
 - Walking The Plank: Making the transition to a successful retirement
 - Unequally Yoked: Financial success in a marriage of opposites
 - Preparing for widowhood
 - Communicating with adult children about your wealth

- **Physicians:**
 - Making work optional in an era of declining reimbursement and increasing taxes

Presentations can be modified for a target audience and last 20-40 minutes plus time for questions. Presentations are general and educational and are not marketing in nature. To explore whether one of our presentations is right for your group, please contact:

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