

Protect What Your Family Has Built

Don't let a lack of planning turn your family's legacy into confusion, conflict, or lost assets. Begin your succession planning and asset discovery & recovery review today.

We're ready... are you?

ABOUT

'The Twenty' represents the evolution of a practice, from providing general financial advice to offering a more intentional, high-touch, family-centered mentorship experience. We work with a select group of clients who want to understand their options, make informed decisions, and build lasting financial confidence.

Our role is to educate, guide and support them with clarity, objectivity, and discretion.

THE TWENTY ADVISORY

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Securities and investment advisory services are offered through **Osaic Wealth, Inc**. member FINRA/SIPC. **Osaic Wealth** is separately owned and other entities and/or marketing names, products or services referenced here are independent of **Osaic Wealth**. Branch office: 6201 Oyster Bay Court, South Fayette, PA 15017

THE TWENTY

PRIVATE FINANCIAL ADVISORY



Local & Personal

Limited to 20 client-family relationships.



THE SOLUTION

A TRANSFORMATION

We assemble, organize, categorize, review, audit, and evaluate your financial portfolio, identifying opportunities for improvement. We prepare everything for a smooth transition. When needed, we can implement solutions through our network of up-to-date product offerings.

THE PROBLEM

- Financial records scattered
- Unclear categories and inconsistent information
- Reports are difficult to interpret
- Errors or weaknesses discovered too late
- Orphaned or forgotten bonds, annuities, or life insurance contracts purchased by others who may be deceased or estranged
- Lack of preparation for audits, decisions, or transitions
- At a crossroads with advisors or other professionals

WHAT WE BRING

- Organized financial records
- Standardized categories and documentation
- Findings and recommendations
- Trusted procedures and controls
- An action plan for improvement
- A transition file and financial roadmap
- A repeatable process
- Peace of mind



Now Offering Complimentary Introductory Sessions

WHO WE HELP

- Families managing personal or multigenerational finances
- Non-profit organizations
- Professional practices
- Estates and trusts
- Small businesses
- Organizations preparing for succesion or sale

FEE-BASED

A Private Family Legacy & Wealth Planning Service