



## Tweed Financial Services

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Our Mission Statement:

*"To seek to benefit the full financial well being of our clients and their families, to help them plan for their lives and assure that their estate passes on as they desire."*



**Rusty Tweed**

We recognize that financial planning is a very complex subject. At Tweed Financial Services, we feel we must

not only a client's investments but also the "whole picture" -- their tax situation, income needs, family needs, objectives and risk tolerance. We prefer to work with clients on a comprehensive basis to assure that the investment vehicles and strategies best suited to their goals, given the constantly changing nature of today's markets and tax laws.

Our people are chosen on the basis of their dedication to the best interests of our clients and the willingness to go the mile to help them. In those areas where we are not expert, we tap into a network of proven professionals for advice.

Looking to do a 1031 exchange for potential tax savings? Come see us or give us a call.

We offer a free financial analysis and consultation for those seeking information to achieve their financial goals. Call me today to call or email me personally. We look forward to meeting and working with you.

Call today for a complimentary introductory consultation or for more information. 1-800-526-1599.

## Real Estate and 1031 Exchanges

Looking for ways to potentially benefit from the equity you have built up in your real estate investments?

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## Our Services

We encourage you to learn more about Tweed Financial through the pages here on this site and by attending our popular and educational seminars.

[Our Services »](#)

## Our Philosophy

Know the client, know the clients long term needs, incorporate real estate planning in the investment plan, and pay taxes when appropriate.

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# The Pros and Cons of a Big Tax Refund

Is receiving a big tax refund a reason to celebrate?

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