Treybourne Wealth Planners

A Plan as Unique as You

LET'S MEET

Delivering Customized Wealth Management Services

At **Treybourne Wealth Planners**, we focus on helping individuals, families, and business owners at all stages of life achieve their

A **fee-only registered investment advisor (RIA)**, we offer customized **wealth management, investment management**, **retirement planning**, and **tax planning** services to our clients in Indiana and across multiple states.

With offices in Greenwood, IN and Chicago, IL, where our team has lived and worked for decades, we take pride in the **trusted relationships** we have built, both as advisors and as neighbors.

As **CPAs**, we have unusually strong roots in accounting and tax planning. We recognize the importance of understanding the tax impact of investment decisions and incorporating the tax impact into overall planning.

Our fee structure allows us to remain independent. We act in the **best interest** of our clients and operate with the highest standards of ethics and integrity.

Treybourne Wealth Planners opens Chicago office, adds advisors

Treybourne Wealth Planners is pleased to announce the addition two long-time advisors and the opening of an office in downtown Chicago, Illinois. "This was a unique opportunity to expand our firm and remain committed to providing the personal service that is important to our clients," said Martin J. Armbruster, CPA/PFS, CFP®, Founding Principal. Read more about this exciting development **HERE.**

Professional Affiliations

FPA Financial Planning Association Proud Member

CFP®

CFA Institute

RIA Stands for you.

AICPA®

The All-Star Financial Group, LLC

AIFP™

reach your financial goals, call us today at our Greenwood, IN office at **317-449-2040** or at our Chicago, IL office at **312-300-0800**. We look forward to meeting you.

About YOU

Embracing Uniqueness

Embracing Uniqueness

Embracing YOUR uniqueness

Each of our client relationships brings unique needs, goals, and financial circumstances. To best serve YOU, which is our daily mission, we want to develop a personal relationship with you and understand how we can develop a plan as unique as you are.

Making The Complex Simple

Rules and regulations, investment options and technology continue to become more plentiful and complex. We want to help you make sense of the noise that exists. We want to help you focus on decisions that are most important. As YOUR financial partner, we want to hear YOU and learn about your dreams, needs, fears, and concerns. We want to help you make sense of the complexities of your situation to help you become more confident of your financial decisions so that you may live with intention and peace of mind.

This Is Us

The Who

The What

The FAQs

The Who

Our team is driven to help our clients. We are held to high ethical standards. We put you at the center of our days and decision making. We work to continually develop knowledge so that we are equipped to answer your questions and give you new concepts. We care about your well-being and personal and unique definition of success and that is where we find satisfaction in our days – knowing that we contributed to you achieving that success. This is what drives us to continue our business with clarity and conviction and joy and a strong work ethic.

Treybourne Wealth Planners

Martin J. Armbruster, CPA/PFS, CFP®

FOUNDING PRINCIPAL

Stephanie Willison, CPA/PFS, CFP®, AIF®

PRINCIPAL

Tim Voegele, CFA®, CFP®

CHIEF INVESTMENT OFFICER

Tracy Bousky, CPA/PFS, CFP®, MBA

LEAD ADVISOR

Treybourne Wealth Planners

Jessica Shugg

SUPPORT ADVISOR

Carol Cooney

OPERATIONS

Tami Ficara

ADMINISTRATOR

Blog

Latest Articles

JUNE 27, 2019

Smart Money Habits For Recent College Grads

The transition from college to adulthood is often centered around establishing financial stability. Consider using this advice to start making sound money decisions that will set you up for long-term future success.

LIFE EVENTS, PERSONAL FINANCE

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Education

As many parents start ramping up their retirement planning efforts, their kids are also reaching an important next step in life: heading off to college. These tips will help you balance the cost of your own financial goals with the education pursuits of your children.

RETIREMENT, COLLEGE SAVINGS

Treybourne Wealth Planners

Client Center

EMONEY ADVISOR

CHARLES SCHWAB

Treybourne Wealth Planners

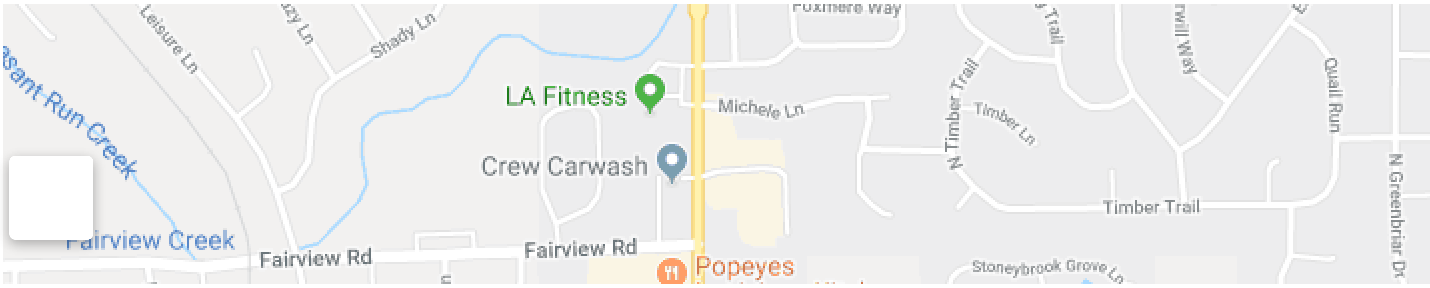
VANGUARD

COLLEGECHOICE 529

Contact

Greenwood, IN Office

Treybourne Wealth Planners



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MESSAGE

SEND

Treybourne Wealth Planners

Investment advisory services provided by Treybourne Wealth Planners, a registered investment adviser with the United States Securities and Exchange Commission. Registration does not imply a certain level of skill or training.

In addition, the firm maintains a "Notice Filing" with the state of Indiana, Illinois, Florida, Ohio, Michigan, and Texas. Treybourne may not provide investment advisory services to any resident of states in which the firm does not maintain a notice filing, unless otherwise exempt. The presence of this website on the Internet shall in no direct or indirect fashion be construed or interpreted to suggest that the firm is offering to sell or soliciting to provide investment advisory services to residents of any state or states in which the firm is not maintaining a notice filing or exempt from registration

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All investing involves risk, including the potential for loss of principal. There is no guarantee that any investment plan or strategy will be successful.