



Team Financial Strategies is more than your typical financial planning firm. We are a team of professionals who are helping our clients achieve their financial planning goals and manage their assets. We desire to remove financial stress and worry from our clients lives so they can enjoy the fruits of their labor. Our first commitment is always to our clients and their financial success. We recognize that planning and investing for the future can be overwhelming, so let us help you take the uncertainty out of the financial planning process and walk with you on this journey.

### Let us help you with...



#### Portfolio Management



We have two styles of management based on the needs and contract with the clients.

Building Wealth

**Wealth Management Portfolios:** For our clients signed up for our “Wealth Management” service, we tailor their portfolio to their needs using investments from various asset classes including options for hedging and enhancing the portfolio. Our investment team considers Macro risks and the client’s advisors consider the individual risk reward profile of the client to build out and manage the individual portfolio.

**Wealth Builder Portfolios:** For our clients signed up for our “Wealth Builder” service our investment team focuses on building portfolios for long term growth while still taking into consideration the clients risk/reward profile. For this service our investment team manages models by selecting mutual funds and percentages of a portfolio to be invested in each fund for a risk reward profile. Then advisors can assign the investments to each client and the portfolio will remain invested and rebalanced based on our team’s parameters on a regular basis.

**Active vs Passive:** Our philosophy leans toward active management but we feel that this should not be a choice of style that an investor must pick. We believe there are definitely times and opportunities where active

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Our team of professionals span of areas that are covered in management clients, we wa financial life where we can ma a comprehensive approach lo and making recommendati management, generation

managers provide a lot of value to a portfolio in various areas of the market and there are also times where passively investing in an index is difficult to beat. With that said, even deciding the allocation of passive investments is an active management decision. It is also an active decision to keep some money in cash. Investing involves decision making. Our goal is to help the client make the best decision possible for their portfolio at a given time based on the information we have for them.

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