TREASURE VALLEY

· FINANCIAL PLANNING ·

Compound Impact: The New Return on Investment

C O R E   F O C U S

Compound Our Impact by Empowering Clients to do the Same

Einstein called compound interest the eighth wonder of the world — but we believe in something even more powerful: Compound Impact™. We empower our clients to make wise financial decisions to live with purpose, create meaningful legacies, and amplify their impact on their best investments: their families, communities, and the causes they care about most.

As a fiduciary, comprehensive financial planning firm with over seventy years of combined experience, we saw an opportunity to serve the community we love by providing independent and objective financial advice. We ensure that wealth is managed not just for financial security, but for lasting significance.

We accomplish this through our Treasure Valley Family Office, a powerful network of CPAs, attorneys, and other strategic professionals working in concert to deliver advanced planning solutions, including:

- DYNAMIC INVESTMENT MANAGEMENT
- ADVANCED TAX MITIGATION
- EFFICIENT WEALTH TRANSFER
- STRATEGIC WEALTH PROTECTION
- MAGNIFIED CHARITABLE GIVING
- INCOME OPTIMIZATION

Every financial decision has the power to compound over time, shaping not just your future but generations to come. As we help our clients build their legacies, Treasure Valley Financial Planning creates its own legacy of Compound Impact™ — expanding financial security, opportunity, and generosity across families and communities.

Join us in maximizing your wealth and your impact.

Core Values

INTEGRITY

PROFESSIONALISM

CO-ELEVATE

HUMBLE & HUNGRY

POSITIVE MINDSET

Who We Serve

Successful Pre-Retiree & Retiree

- Couples
- Women making big financial decisions alone
- Business Executives
- Business owners looking to exit within 5 years
- 1-10M investable assets | 3-20M Net Worth
- Lives in the Treasure Valley
- Experienced investors
- Want family office experience
- Want to compound their impact

We Are Different

Treasure Valley Family Office

A powerful network of CPA's, attorneys, and other strategic professionals working in concert to deliver advanced planning solutions beyond investing.

Advanced Tax Planning

Proactive tax planning combined with advanced strategies designed to reduce lifetime tax burden.

Dynamic Investment Management

Protection first with strategic growth to dynamically shift in a complex and changing world.

The TVFP Planning Process

DISCOVERY

Exploratory Call
Identify Needs & Assess Fit

Discovery Meeting
Values, Goals, & Priorities

Initial Findings
Observations & Opportunities

Mutual Commitment
Formalize Partnership

→

FOUNDATION

Retirement L.I.F.E. Plan™
Personalized Financial Framework

TVFP Family Office
Specialized Partners

Advanced Plan
Five Financial Pillars

Implementation
Prioritized Action Items

→

PROGRESS CYCLE

Annual Preview Meeting
Goals & Opportunities

Tax Review
Preliminary Tax Strategy Plans

Strategy Meeting
Investment Review & Estate Planning or Asset Protection

Tax Strategy Execution
Finalize Tax Strategies

Advanced Plan

- Income Optimization
- Dynamic Investment Management
- Magnified Charitable Giving
- Efficient Wealth Transfer
- Strategic Wealth Protection
- Advanced Tax Mitigation

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