



# Wealth Management

The Right Private Wealth Management Path  
Begins with the Right Financial Partner.

**BAIRD**

Private Wealth  
Management



**BAIRD**

**Jason Turetzky,**  
*Senior Vice President,  
Financial Advisor*

## **Helping You Live Well in Retirement**

I've built a successful financial planning practice by never forgetting that I don't just provide retirement planning and generational wealth transfer expertise to one individual. I am driven by a genuine passion to help clients achieve what they want for themselves and, ultimately, for the people and organizations they care about most.

## **Committed to Protecting Your Wealth**

Through straightforward and grounded counsel, I have helped hundreds of high net worth individuals effectively navigate changing market conditions to protect and grow wealth and plan their legacy. This affords my clients the opportunity to enjoy retirement, address unexpected expenses, plan for their later years and safeguard their wealth for loved ones.

## **Creating Your Personal Legacy Together**

The process of wealth transfer is complex and ever-changing. One of my core areas of expertise is in wealth transfer strategies for clients near or in retirement.



The wealth transfer plans I create for my clients are highly personalized and based on decades of experience.

### What My Practice Can Do for You

My Senior Client Specialist Janet Robertson and I collectively have over 60 years of wealth management experience here in Tucson, Arizona. We've successfully navigated nearly every scenario imaginable. You can be assured we will use our vast experience, professional network and resources to carry out your specific wishes.

#### Let us help you:

- *Evaluate and fine tune your portfolio*
- *Plan for an exceptional retirement*
- *Prepare for unanticipated expenses*
- *Avoid tax law missteps*
- *Oversee the complexities of your estate*
- *Create a wealth transfer plan*
- *Create long-term care strategies*



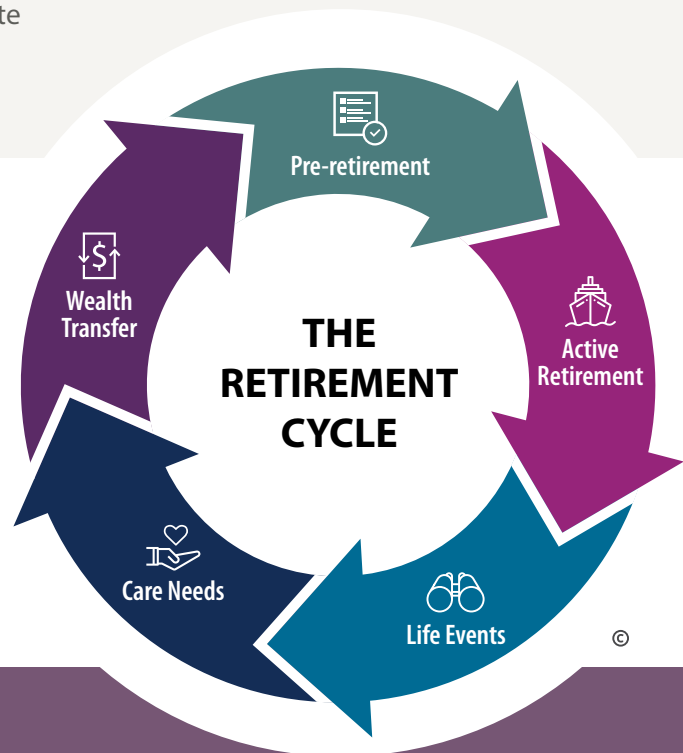
## Local Expertise. International Resources

In Baird, you have local wealth management experts connected to world-class resources to help you manage and transfer your wealth responsibly in this stage of your life. We understand that you have worked hard to build wealth and that market fluctuations and unnecessary risk can't be overcome with time. What was once a need to only grow your assets is now a need to use your money in retirement, for unexpected life changes, long-term care and to sustain it for future generations.

At any point in the retirement cycle we can help you and your family successfully navigate and manage the following milestones »

### About Baird

Baird is an international wealth management, capital markets, asset management and private equity firm. We know from experience that the only way to help you reach your goals is to keep your best interests in mind – always.



**Our promise is to help you live well today,  
while safeguarding and creating a wealth legacy.**

## My Trusted Partners

At Baird I have access to world class resources focused on advanced planning, financial, and estate planning and fixed income trading. In addition, my professional network includes some of Tucson's finest certified accountants and tax professionals, estate attorneys, and real estate experts.

Together, we are driven by a genuine passion to help you achieve your retirement, long-term care and giving goals.



**Janet Robertson,**  
*Senior Client Specialist*

| [jrobertson@rwbaird.com](mailto:jrobertson@rwbaird.com)  
520.615.2011



Live Your Best Life. Leave A Legacy.



Contact Jason Turetzky to schedule an initial portfolio evaluation today.  
Call 520.615.2008 or email [jturetzky@rwbaird.com](mailto:jturetzky@rwbaird.com).

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Jason Turetzky  
Senior Vice President, Financial Advisor  
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WEB: [bairdfinancialadvisor.com/jturetzky](http://bairdfinancialadvisor.com/jturetzky)

EMAIL: [jturetzky@rwbaird.com](mailto:jturetzky@rwbaird.com)

PHONE: 520.615.2008

TOLL-FREE: 877.792.3487

3567 E. Sunrise Drive, Suite 143  
Tucson, AZ 85718



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