Meeting 1: Taking Control

Introduction to Tucker Bria and the Strategic Financial Living Program:
What to expect and an overview of our financial planning process.

Personalized Approach:
We will identify the planning topics that are important to you. This is not an off-the shelf program. We discover your unique needs and ensure we understand your personal, professional, and financial objectives.

Define Your Financial Goals:
We identify your financial aspirations and goals, both short-term and long-term, providing clarity and direction for your financial journey.

Budgeting Made Easy:
Decide whether a budgeting app or an Excel spreadsheet works best for you to manage your finances. You then implement a budgeting process for life.

Plot your Roadmap for Success:
Receive a comprehensive checklist with topics to guide our financial planning discussions, ensuring we address the areas that matter most to you.

Next Steps:
Set a convenient date and time for our next meeting, where we'll dive deeper into structuring your Strategic Financial Life.

Meeting 2: A Deep Dive

POSSIBLE TOPICS

- Saving for college
- Real Estate
- Debt management
- Investment assets
- Risk management
- Estate planning
- Other financial questions

- **Fact-Finding:** Conduct a detailed fact-finding process to gather additional information about your financial situation, assets, liabilities, income, expenses, and other relevant inputs
- **Education on Your Chosen Topics:** Provide in-depth information and education on the specific financial planning topics chosen by you. This can include investment strategies, real estate acquisition, tax planning, debt management, or any other relevant area of interest
- **Checklist Review:** Go over the checklist provided in Meeting One and prioritize the topics or areas of financial planning that you wish to focus on
- **Presentation Process:** Discuss the upcoming presentation of the financial plan. Explain the format, tools, and methodologies that will be used to present the plan effectively

Meeting 3: Embarking On A Strategy For Success

Presentation of Your Financial Roadmap:
Engage in an interactive session where we present the findings of your customized financial plan developed using industry leading financial planning software.

Clarity and Understanding:
Confirm that the presented plan makes sense to you, providing clarity and a comprehensive strategy for your financial path.

Define Our Future Partnership:
Discuss ways for on-going or intermittent collaboration and engagement, ensuring support and guidance **OF YOUR CHOOSING** for your financial journey.

TUCKER | BRIA
WEALTH STRATEGIES

ABOUT US

A TRUSTED PARTNER IN WEALTH MANAGEMENT

The advisors and planners at Tucker Bria have **over 45 years of wealth management experience** guiding clients through every phase of life.

The principals of the firm, Jim Tucker, CFP® & Pat Bria have business experience in addition to wealth management. Prior to entering the wealth management field, Jim was part of two start-ups that went public, and Pat was involved with real estate and entrepreneurial firms.

Your Financial Life in Focus®

Strategic Financial Living

Your Financial Life in Focus®

**JUST YOU.
NOT A SEMINAR OR CLASS!**

Tucker Bria Wealth Strategies
3100 Tower Blvd, Suite 117
Durham, NC 27707

TUCKER | BRIA
WEALTH STRATEGIES

Strategic Financial Living

Your Financial Life in Focus®

TUCKER | BRIA
WEALTH STRATEGIES

INTRODUCING AN INDIVIDUALIZED PLANNING PROCESS
SO YOU CAN **GAIN CONTROL OVER YOUR FINANCIAL LIFE.**

DISCOVER THE TRANSFORMATIVE POWER OF OUR STRATEGIC FINANCIAL LIVING PROGRAM

SCAN ME

CALL OR SCAN NOW TO START YOUR JOURNEY | (919) 381-5780

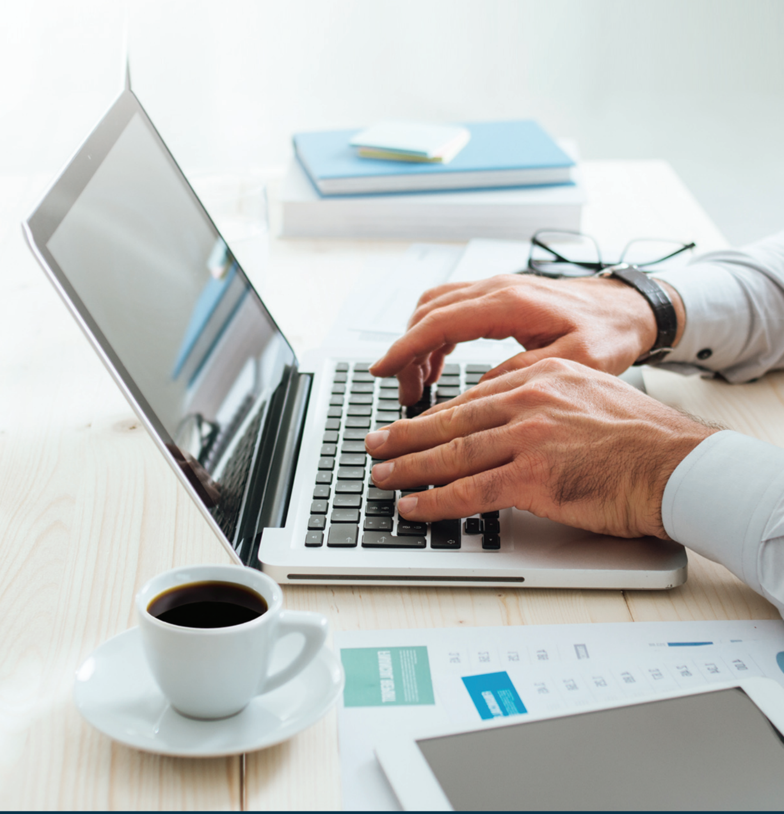
GOAL ORIENTED FINANCIAL PLANNING | JUST YOU. NOT A SEMINAR OR CLASS!

Strategic Financial Living

Your Financial Life in Focus®

Ideal for the 35-50 year old with annual earnings in excess of $200,000

- The Tucker Bria Strategic Financial Living Program is designed for individuals and families building their careers who are ready to bring their financial life into focus.
- Through a series of three personalized meetings with our experienced financial professionals, Strategic Financial Living aims to empower you with the knowledge, tools, and strategies needed to pursue your financial goals.
- From understanding your unique financial situation to creating a tailored plan, we will guide you every step of the way.



Why Strategic Financial Living is Important

- Gain clarity about your financial goals and create a roadmap to achieve them.
- Optimize your resources and make informed decisions to maximize your wealth potential in a tax-efficient manner.
- Mitigate risks and protect yourself and your loved ones from financial setbacks.
- Develop strategies for wealth accumulation and long-term financial growth.
- Make confident financial choices, backed by advice and actionable insight.
- Adapt to life's changes and develop the financial resilience to navigate financial challenges with ease.
- Leave a lasting legacy for your family and future generations.

HOW OUR PROGRAM CAN TRANSFORM YOUR FUTURE

- **Achieve Clarity and Direction**
- **Maximize Wealth Potential**
- **Mitigate Risks and Protect Assets**
- **Build a Strong Financial Foundation**
- **Plan for Retirement with Confidence**