BRAUN-BOSTICH & ASSOCIATES, INC.

WEALTH TRANSFORMED

CASSANDRA L. KIRBY

Cassie's journey with **Braun-Bostich & Associates** began while completing her bachelor's degree in business administration at California University of Pennsylvania in 2001. While learning every facet of the business over the past 18 years, Cassie became a **(CFP) Certified Financial Planner®** in 2009 and an **(EA) Enrolled Agent** in 2014.

Cassie believes that Financial Planning and helping each client define and achieve their goals is truly understanding who they are as individuals and what (and who) is most important to them. It's forming and maintaining these relationships that she enjoys most about the business.

Born Cassandra Bioni, she goes by Cassie and was raised in Lawrence, Pennsylvania. Cassie is married with two amazing children and enjoys being in the sunshine, running, baking as a form of therapy, trying new restaurants and catching up with family and friends as often as possible.

IN AN INTERVIEW, CASSANDRA CAN DISCUSS:

- Cash Flow Management
- Retirement Planning & Distribution Strategies
- Social Security
- Tax Strategies
- Net Unrealized Appreciation Planning

RESOURCES www.braun-bostich.com

- Fiduciary Rule
- Second Opinion Service
- Wealth Management Process & Formula
- Advisor Designation Guide
- Financial Life Fundamentals

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1600 Ashwood Drive, Suite 1601
Canonsburg, PA 15317
724.942.2639

2022 FACT SHEET

As an independent Registered Investment Advisor (RIA), **Braun-Bostich & Associates, Inc.** believes that implementing unique wealth management strategies around reducing taxation, gifting and keeping up-to-date on an ever-changing regulatory and legislative environment becomes imperative to achieving good planning results. Helping clients allocate assets, create trusts, provide for a legacy, utilize gain/loss harvesting, provide personalized income strategies, implement risk management strategies and asset location strategies are important processes we provide. Ultimately, we all want the same things... live well today, prepare for an uncertain future and provide for our family as efficiently and effectively as possible - "We provide the framework to help clients achieve these things and the peace of mind that comes with it. As fee-only advisors we operate objectively, independently and transparently".

Core Services: Retirement and Financial Planning, Investment Management, Estate Planning, Wealth Transfer, Wealth Protection, Charitable Giving and Tax Mitigation strategies

Associates: 8 full time

Leadership: Amy Braun-Bostich - Founder, CEO and Private Wealth Advisor — Cassandra Kirby - Co-Founder, COO, CCO and Private wealth Advisor

Community: With tremendous pride and two decades of community service tradition, our employees work hand in hand making long lasting contributions to better the lives of individuals and their families within our community. Our commitment to community and passion for service is a mainstay of our firm.

Firm Purpose: Helping our clients to create greater opportunity for themselves by leveraging our exceptional capabilities. In doing so, they are able to transcend their notion of what is possible.

For more information: Contact Steve Conroy, Director of Business Development at 724.299.1720 / sconroy@braun-bostich.com