# BRAUN-BOSTICH & ASSOCIATES, INC.

WEALTH TRANSFORMED

## TAMMY POMPEI

Tammy entered the financial services industry in December of 2015 and prides herself on learning all there is to know about the industry each and every day. She has obtained her **Pennsylvania State Insurance License** along with the **Series 7 and Series 66 Securities Registrations**, and most recently secured her **Certified Financial Planner (CFP)** designation. In the office, she is primarily responsible for the gathering of data from clients and keeping client profiles updated.

In 2010, Tammy received her **Bachelor of Arts degree in English and Spanish** from **Washington & Jefferson College** in Washington, PA. After graduation, she enrolled in a Global Cultural Studies program at the **University of Lyon**, in France that focused on the associations between language, identity, and ethnicity.

Out of the office, Tammy volunteers as an English tutor through the **Greater Pittsburgh Literacy Council**. She enjoys traveling, shopping, yoga, and dining out with family and friends. .

IN AN INTERVIEW, TAMMY CAN DISCUSS:

- Financial Planning
- Estate Planning
- Budget & Cash Flow Analysis
- Education and Student Loan Planning
- Money Issues facing Gen-x and Millennial's
- Big Life Event Planning
- Financial Life Goal Setting

RESOURCES www.braun-bostich.com

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

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# 2023 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:** Pre-Retirement / 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 L. 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