# BRAUN-BOSTICH & ASSOCIATES, INC.

WEALTH TRANSFORMED

## AMY BRAUN-BOSTICH

Amy is the CEO and founder of Braun-Bostich & Associates, Inc. As a Private Wealth Advisor, she spends much of her waking day striving to bring greater value to the table for her clients. Along with providing proven **Investment Management** guidance for over two decades, Amy focuses on each client's Advanced Planning needs in the areas of **Wealth Enhancement, Transfer, Protection and Charitable Giving.**

Amy has over 30 years in the Financial Services business and has invested the time and discipline toward ongoing education to bring her clients the best advice possible for their situation. Amy has a BA in Psychology from UCLA, an **MSFP (Master of Science in Financial Planning)**, a **CFP (Certified Financial Planner)** and an **APMA (Accredited Portfolio Manager Advisor)** from the College of Financial Planning. She also holds a **CFS (Certified Fund Specialist)** from the Institute of Business & Finance and a **CLTC (Certification in Long Term Care)** from the Corporation for Long Term Care.

When trying to separate herself from the business, Amy enjoys reading, walking, travel and gardening, but mostly just hanging out with her family.

## IN AN INTERVIEW, AMY CAN DISCUSS:

- Financial Planning
- Advanced estate Planning
- Legacy-Generational Wealth Transfer
- Charitable Giving Do's & Don'ts
- Tax Consideration in Retirement
- Retirement Distribution Strategies
- Investment/Asset Allocation
- Social Security

## Resources available at: 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, fiduciary 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