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Wisdom, Clarity, and Intention.

To pursue lifetime dreams and to build a legacy, you must plan with wisdom, clarity, and intention.

With thousands of financial options available to you, decisions can become overwhelming. It makes sense to seek the stability, strength, and permanence of a team of financial advisors who have served our community for over 30 years. We help bring clarity and confidence to your life through financial education and planning which allows you to confidently focus on the important things in life.

At TVAMP, we provide objective investment advice guided by your goals, risk tolerance, and overall financial position. Our holistic process helps you get your financial house in order.

Your TVAMP advisor can consult with your team of professionals (CPA, attorney, and others) to construct a financial plan and investment portfolio specifically for your needs. Once the plan is in place, we make sure it continues to evolve and adjust, just like your life.

We empower you to truly commit to your financial goals and pursue what matters most to you. We strive to help you **Live Invested®**.



We are proud to have several **Certified Financial Planner™ (CFP®) Professionals** at TVAMP who are committed to helping you pursue your long-term financial goals. We offer **fee-based investment management services***. Simply put, the cost of investment management is a percentage fee based on the value of the assets in your account.

Comprehensive Wealth Management

Financial Planning

- Cash Flow Management
- Insurance
- Preservation Strategies
- Long-Term Care
- Business Succession Planning

Retirement Income

- IRAs
- Defined Contribution Plans
- Defined Benefit Plans
- Executive Compensation
- Annuities

Investment Management

- Risk Assessment
- Portfolio Management
- Asset Allocation
- Diversification
- Tax Consequences
- 401(k) Guidance

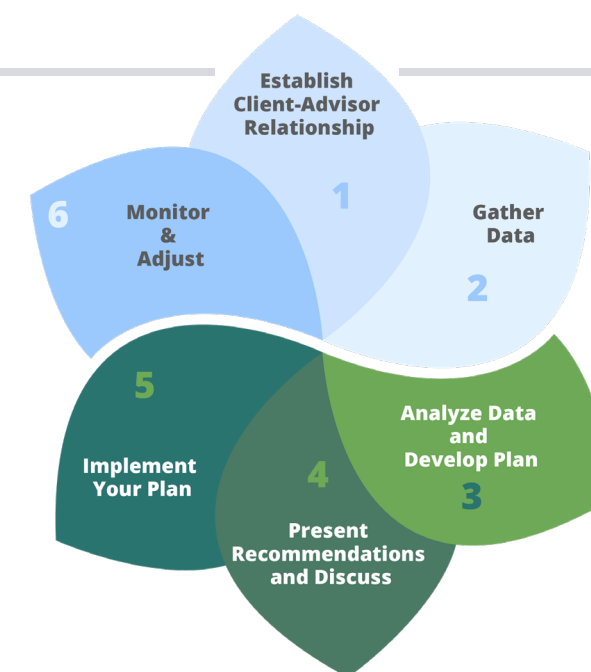
Education Planning

- 529 Plans
- Education IRAs
- UTMAs
- Financial Aid Planning
- Coverdell ESAs

Legacy Planning

- Will Planning**
- Intergenerational Wealth Transfers
- Trust Planning**
- Charitable Giving
- Family Limited Partnerships

Our Financial Planning Process



Securities offered through LPL Financial, Member FINRA/SIPC. Investment advice offered through TVAMP, a registered investment advisor and separate entity from LPL Financial.

LPL Financial representatives offer access to Trust services through The Private Trust Company, N.A., an affiliate of LPL Financial.

**Commission based services are also available if you prefer.*

***Neither LPL Financial nor TVAMP provide legal or tax services. Trusts and wills may only be drafted by your attorney.*

