

FAMILY TREE WEALTH MANAGEMENT PRESENTS
 Exceptional Services without Exception



Live your dream.

	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC
Workshops		x	x	x	x	x			x	x		
Family Event											x	
Conference Calls			x			x			x			x
E-Newsletter	x	x	x	x	x	x	x	x	x	x	x	x
Bob's Blog	x	x	x	x	x	x	x	x	x	x	x	x
Collaborators Meetings	UPON REQUEST											
Special Podcasts			x			x			x			x
The Roby Report			x			x			x			x
Portfolio Reviews		x	x	x	x	x	x	x	x	x	x	x
Client Meetings		x	x	x	x	x	x	x	x	x	x	x
Family Council Advisory	UPON REQUEST											

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