



PROGRESS WEALTH MANAGEMENT

THE MASTERCLASS ON FINANCIAL PLANNING FOR TECH PROFESSIONALS

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About Us

Progress Wealth Management is a non-commissioned, Tax & Financial Planning firm that specializes in taking the "guesswork" out of helping Professionals In Tech plan for their future.

We aim to help our clients stop wasting money on taxes, improve their earning ability (faster), and to simplify their financial life so they focus their free time on the things that they enjoy rather than research financial planning.

Contact us by visiting progresswealthmanagement.com and clicking "talk to an advisor", today.





7 Financial Planning Problems That Tech Professionals Experience

1.

2.

3.

4.

5.

6.

7.





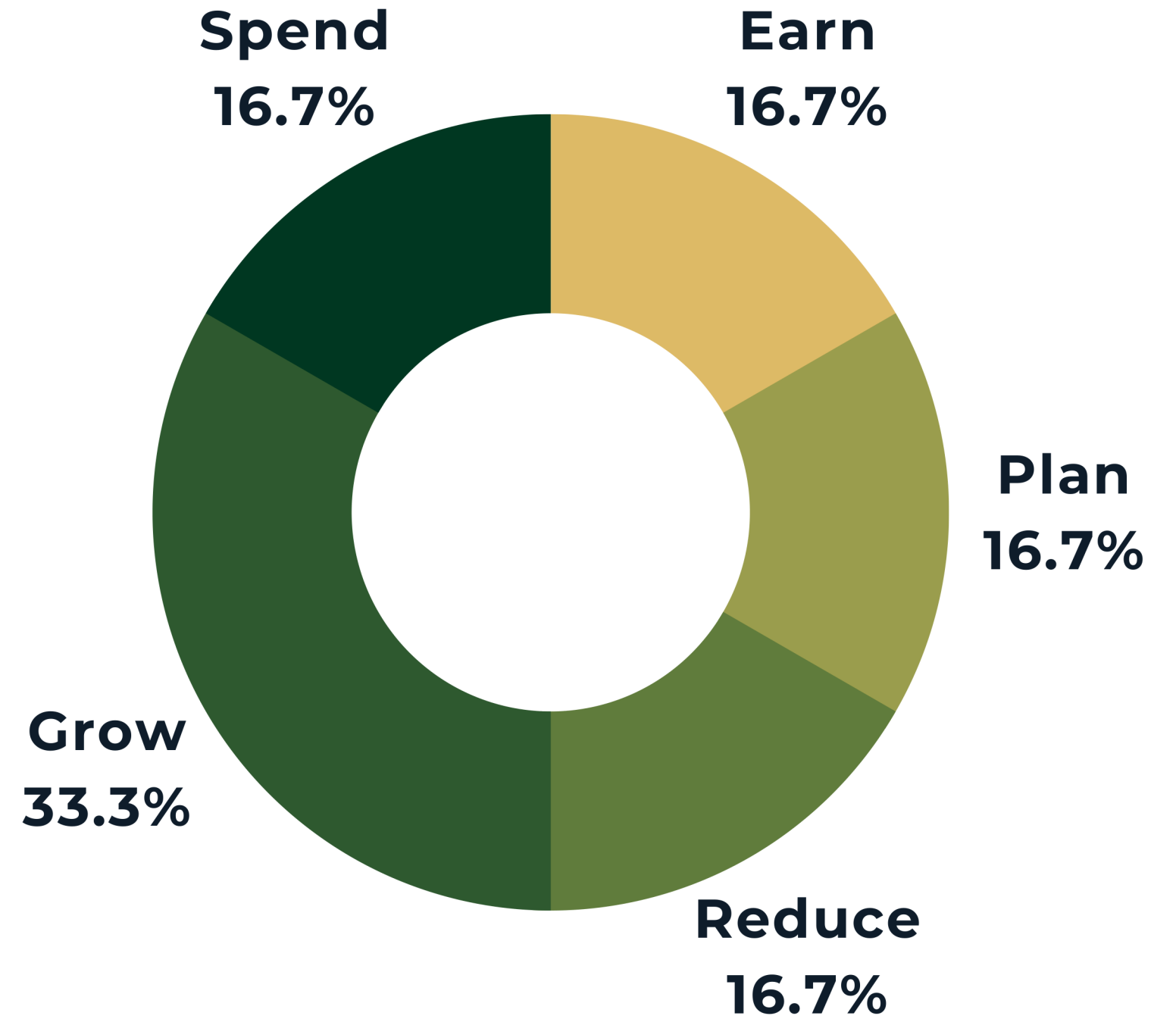
8 Mistakes Tech Professionals Make

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.

A Perfectly Managed Financial Plan

- 1. Earn:
- 2. Plan -
- 3. Reduce -
- 4. Grow-
- 5. Monitor & Spend

We want you to just enjoy the fruits of your labor at this point.





Earn

- 1.
- 2.
- 3.
- 4.





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Investing Mistakes

Remedies

- 1.
- 2.



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Employee Benefits Mistakes

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

Remedies



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Tax Mistakes

Remedies



Budgeting

We believe that budgeting doesn't have to be complicated.

Spreadsheets, categories, and analysis are all unnecessary when the reality is, your problem is your behavior; not the lack of analysis.

The Keys To A Properly Managed Budget:

- 1.50/30/20 Rule
2. Automate, Automate, Automate
3. Find an accountability partner



Retirement Planning

Most tech professionals want to retire early and travel the world. The hard part is, how to get there?

Here are some high-level tips:

- 1.
- 2.
- 3.



So, what's this all worth?

A

is for active rebalancing of investment portfolios: **0.11%**

+

B

is for behavioral coaching: **2.37%**

+

C

is for customized experience and family wealth planning: **1.21%**

+

T

is for tax-smart planning & investing: **1.22%**

= 4.91% – the value of your advice in 2022



PROGRESS WEALTH MANAGEMENT

Our Team



Blaine Thiederman
MBA, CFP
*Founder & Principal
Financial Planner*



Vasil Baychev, EA
Tax Expert



**Coleen
Beckemeyer**
*Insurance
Expert*



PROGRESS WEALTH MANAGEMENT

Our Services



Financial Planning



Tax Reduction



Investment Management



**Employee Benefits
Optimization**



1. Gather Information
2. Develop
3. Present your options
4. Implement
5. Monitor by meeting up quarterly - pivoting when appropriate

How It Works



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**THANK
YOU**

Important Disclosures

Please remember that all investments carry some level of risk, including the potential loss of principal invested. They do not typically grow at an even rate of return and may experience negative growth. As with any type of portfolio structuring, attempting to reduce risk and increase return could, at certain times, unintentionally reduce returns.

Diversification and strategic asset allocation do not assure profit or protect against loss in declining markets.

The Investment Company Institute is the national trade association of U.S. investment companies, which includes mutual funds, closed-end funds, exchange-traded funds and unit investment trusts.

Bloomberg U.S. Aggregate Bond Index: An index, with income reinvested, generally representative of intermediate-term government bonds, investment grade corporate debt securities, and mortgage-backed securities (specifically: Barclays Government/Corporate Bond Index, the Asset-Backed Securities Index, and the Mortgage-Backed Securities Index).

FTSE EPRA/NAREIT Developed Index: A global market capitalization weighted index composed of listed real estate securities in the North American, European and Asian real estate markets.

MSCI Emerging Markets Index: A float-adjusted market capitalization index that consists of indices in 21 emerging economies: Brazil, Chile, China, Colombia, Czech Republic, Egypt, Hungary, India, Indonesia, Korea, Malaysia, Mexico, Morocco, Peru, Philippines, Poland, Russia, South Africa, Taiwan, Thailand, and Turkey.

The MSCI World ex U.S. Index tracks global stock market performance that includes developed and emerging markets but excludes the U.S.

The Russell 1000® Growth Index measures the performance of the large-cap growth segment of the U.S. equity universe. It includes those Russell 1000 companies with higher price-to-book ratios and higher forecasted growth values.

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The Russell 2000® Index measures the performance of the small-cap segment of the U.S. equity universe. The Russell 2000 Index is a subset of the Russell 3000® Index representing approximately 10% of the total market capitalization of that index. It includes approximately 2,000 of the smallest securities based on a combination of their market cap and current index membership.

The Russell 3000® Index measures the performance of the largest 3,000 U.S. companies representing approximately 98% of the investable U.S. equity market.

The S&P 500® Index is an index, with dividends reinvested, of 500 issues representative of leading companies in the U.S. large cap securities market. Indexes are unmanaged and cannot be invested in directly. Returns represent past performance, are not a guarantee of future performance, and are not indicative of any specific investment.

Past performance does not guarantee future performance.

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