



NEWS

For Immediate Release

TFC Financial Launches Charitable Foundation

Community Focus Advances the Firm's Values

BOSTON (March 20, 2018) – [TFC Financial](#), a Boston-based Registered Investment Advisor, has launched the TFC Financial Charitable Foundation, to express the firm's values and advance its commitment to promoting financial literacy and supporting the greater Boston community. "This is something we have been considering for some time, and are so pleased that it has come to fruition," said CEO Renée Kwok. "As a wealth management firm, we frequently counsel clients on charitable giving strategies. With the new Foundation, we are establishing our own philanthropic legacy for the firm."

The Foundation's mission is threefold: to promote financial literacy; to provide education and information about behavioral finance to help people stay on track to achieve their financial goals; and to support local social programs. The initial funding of the Foundation came from the firm's partners and shareholders – both past and present – via personal capital. Ongoing funding will come from the firm's annual profits. There will be no solicitation or acceptance of clients' funds.

TFC Financial Management was founded in 1980, as an independent, fee-only Registered Investment Advisory firm, majority owned by employees. The firm provides financial planning, personal financial advisory services and asset management for individuals, couples and families with a net worth ranging from \$3 to over \$30 million. They also offer strategic financial planning and endowment asset management services for boards of non-profit organizations. The firm's goal is to help clients build and preserve wealth through retirement, transfer wealth to next generations, and, as a fiduciary, to ensure that the client's interests always come first.

TFC has particular expertise in the following:

- Multi-generational families
- Life transitions, including retirement, inheritance, marriage, birth of a child, loss of a family member
- Women transitioning through divorce or loss of a spouse
- Employee-related decisions, including evaluating and optimizing stock option and other employer equity compensation plans, benefits, employment transitions

For information about the firm or the Foundation, contact Betty Harris at bharris@tfcfinancial.com.

ABOUT TFC FINANCIAL

Founded in 1980, TFC Financial is a fee-only Registered Investment Advisor offering comprehensive financial planning and investment management to a select clientele. Owned by its principal employees, the Boston-based firm serves individuals, couples and families, as well as non-profit boards. For more information, visit www.tfcfinancial.com.

Registration with the SEC should not be construed as an endorsement or an indicator of investment skill, acumen or experience. Historical performance is not indicative of any specific investment or future results. Views regarding the economy, securities markets or other specialized areas, like all predictors of future events, cannot be guaranteed to be accurate and may result in economic loss of income and/or principal to the investor.

Contact:

Leslie Swid

Impact Communications

913-649-5009

leslieswid@impactcommunications.org

###