BAIRD

Private Wealth
Management

What Your Parents Wish They'd Taught You About Money

Creating a financially secure future today is harder than ever before. With limited education and understanding of basic financial concepts, families are struggling to live the "American dream" the healthy way. In *Hey, I Forgot to Tell You*, financial advisors Terry Lineberger and Kelly Lauterjung introduce simple techniques for creating healthy, enduring financial habits.

- Save money without feeling deprived
- Pay off seemingly infinite debt
- Determine whether homeownership is the right choice
- Initiate honest conversations with family members about money

If you and your loved ones are digging yourselves into a hole, put down the shovel. *Hey, I Forgot to Tell You* will show you the way out – and up.

The Lineberger Group
Private Wealth Management

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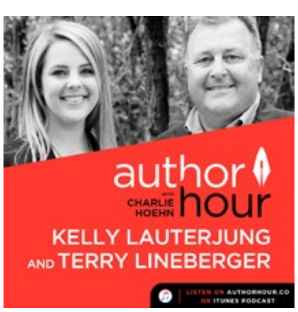
PODCAST'S WE'VE BEEN FEATURED ON:



WHERE TO BUY:

The Lineberger Group

PRIVATE WEALTH MANAGEMENT

We have developed and refined a wealth management process to help families reach their goals. We offer our clients personalized and practical financial plans and advice on appropriate investments to help them achieve the goals they've set. The principles discussed in the book are what our own family, and many others we work with, have set as the foundation for major financial decisions.

Personal relationships are of utmost importance to our team. We strive to deeply understand who our clients are and what is important to them and their families. We want to share in our client's vision of the future and help them achieve lifetime goals. One of our greatest joys is seeing the excitement and sense of accomplishment when a client reaches a major milestone.

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Growing up the daughter of a Financial Advisor, hard work, financial concepts, and planning for the future were regular conversations. After graduating from the University of Oregon with her Bachelor of Science in Accounting, Kelly started her career at Oracle. While her time there was invaluable, she felt a bigger calling to make an impact in the lives of others. Kelly joined Baird and the family business in 2016. Since then, she has proven to be an integral part of the team, bringing fresh ideas and a new dynamic to client relationships. She has also earned the CERTIFIED FINANCIAL PLANNER™ certification and CERTIFIED DIVORCE FINANCIAL ANALYST® designation.

Terry Lineberger, CFP®, CPA
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Terry's many years of experience help him to develop personalized financial plans that reflect the "real world" situations that each individual client faces. He and his wife of 30 years, Debbie, have two beautiful daughters. He feels he has learned a great deal about finance from his role as a parent. Growing up in a poor, single-parent household in a small town in North Carolina, Terry learned the value of hard work and saving at a young age. His biggest sources of inspiration were his grandparents. Over the course of his career, he has earned a Bachelor of Science in Accounting, a Certified Public Accounting license, a Master of Business Administration, and the CERTIFIED FINANCIAL PLANNER™ certification.