

# WHY TOBERMAN BECKER?

WE PROVIDE ELITE INVESTMENT GUIDANCE AND CUSTOM PLANNING  
TO SECURE YOUR LONG-TERM FINANCIAL WELL-BEING

## PROTECT YOUR FUTURE

WE HAVE WORKED WITH  
**HUNDREDS**  
OF FAMILIES +  
SMALL BUSINESSES

TO

CREATE  
**CUSTOM-BUILT**  
PLANS TO  
**SAFEGUARD**  
ACCUMULATED WEALTH

## NURTURE YOUR FINANCIAL GOALS

WE PLAN  
THOROUGHLY +  
METHODICALLY

## INDEPENDENT ADVISOR

USING THE BEST INDUSTRY TOOLS

FEE: ONLY  
**.75%**  
(AUM)

**NO \$**  
FROM  
COMMISSIONS

## BUILD YOUR LEGACY

**70%**

of wealthy families

**LOSE THEIR WEALTH**  
by the second generation

AND

**90%**  
LOSE IT  
by the third

MICHAEL BECKER, CFA, CFP®



CRAIG TOBERMAN, CFA, CPA, CFP®



“ WE HAVE INVESTED OURSELVES TO BE AS VALUABLE AS POSSIBLE TO CLIENTS—  
INCLUDING EARNING THE HIGHLY-REGARDED CHARTERED FINANCIAL ANALYST® CERTIFICATION. ”

1741 S BIG BEND BLVD, ST. LOUIS, MO 63117 | 314-783-9860 | MICHAEL@TOBERMANBECKER.COM

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