

Family Financial LLC

Tammy Trenta, CEO & Lead Advisor

Family Financial LLC provides integrated investment management, financial planning, tax strategy, tax preparation and business advisory services and serves as the central point of coordination, bringing multiple financial professionals into one cohesive strategy. Owner Tammy Trenta has advised high-net-worth families and business owners for three decades.

WHAT DOES “FINANCIAL WELLNESS” MEAN TO YOU?

Financial wellness is about clarity, coordination and confidence. It means your financial life is working together in a way that reduces stress, creates peace of mind and gives you more time to focus on the people and priorities that matter most.

WHAT’S A GOOD FINANCIAL HABIT FOR EVERYONE?

Be intentional instead of reactive. The best outcomes usually come from a thoughtful plan followed consistently over time, rather than constantly changing direction.

WHAT’S A BELIEF ABOUT MONEY YOU’VE CHANGED YOUR MIND ON OVER THE YEARS?

I used to think more complexity meant better results. Over time, I’ve learned that simplicity—paired with coordination, discipline and good decision-making—often leads to better long-term outcomes.

WHAT DO CLIENTS WORRY ABOUT THAT’S SURPRISING?

Even very successful people worry about making the wrong decision. It’s often less about the numbers and more about uncertainty, information overload and not having enough time to think clearly through important choices.

WHAT’S A QUIET “WIN” IN YOUR WORK THAT WOULDN’T SHOW UP ON A BALANCE SHEET?

When a client stops worrying. When things feel organized, coordinated and manageable, that sense of relief is incredibly meaningful.

WHAT’S MOST REWARDING ABOUT YOUR WORK?

Helping clients move from feeling overwhelmed to feeling organized and confident. When everything is coordinated and they no longer have to manage multiple professionals on their own, it gives them back valuable time and peace of mind.

WHAT MISCONCEPTIONS DO PEOPLE OFTEN HAVE ABOUT WORKING WITH A FINANCIAL ADVISOR?

That it’s only about investment returns. Performance matters and shouldn’t be discounted, but the bigger goal is improving overall financial outcomes through a coordinated, family office approach that aligns every part of a client’s financial life.

Highlights

- Family Office Model
- Tax Strategy
- Exit Planning
- Proactive Coordination

WHAT’S A FINANCIAL DECISION THAT LOOKS SMART ON PAPER BUT OFTEN ISN’T IN REAL LIFE?

Chasing returns or over-optimizing for taxes without considering the bigger picture. The best strategies are the ones that work in real life and support long-term goals, flexibility and peace of mind.

HOW IS TECHNOLOGY CHANGING HOW YOU WORK?

Technology helps us operate more effectively as a family office by improving coordination, communication and visibility. It allows us to be more proactive and spend more time focused on personalized advice and strategy.

WHAT FIRST DREW YOU TO FINANCIAL ADVISING—AND WHAT KEEPS YOU PASSIONATE?

Early in my career, I saw successful families juggling separate advisors who didn’t talk to each other—and paying for it in missed opportunities and decision fatigue. I started Family Financial to fix that. What keeps me passionate is seeing clients get their time and clarity back.

IN WHAT WAYS DO YOU GIVE BACK?

I mentor younger women building careers in finance, and I’m often a sounding board for clients’ adult children as they navigate their own first big financial decisions. Helping the next generation feel confident with money matters to me.

TELL US ABOUT YOUR TEAM.

Our team is incredibly client-focused and committed to delivering a true family office experience. We coordinate closely with CPAs, attorneys and other professionals so clients don’t have to manage everything themselves. It’s rewarding to see how much clients value having a team they can trust to help simplify their lives.

Disclaimer: Family Financial LLC is an SEC-registered investment adviser. Registration does not imply a certain level of skill or training. Investing involves risk.



PHOTOGRAPHED BY SHANE O'DONNELL