

# Building Futures With Confidence



500+

Household Clients

80+

School Districts

Through the financial planning program, you have the opportunity to meet 1-on-1 with a financial advisor that will educate and assist you in planning for your future. This could include guidance with saving for retirement via employer sponsored plans, evaluating your TRS and/or Social Security retirement options, overview of 403b/401k accounts, and other financial planning topics.



## Retirement Overview

Providing a clear view of your TRS/Social Security retirement readiness and next steps.



## Investment Management

Managing your investments to align with your goals, timeline, and risk tolerance.



## Tax Planning

Identifying strategies to minimize taxes over your lifetime and for your heirs.



## Estate Planning

Ensuring your assets are protected and distributed according to your wishes.

*We understand that each client has unique financial needs. Our approach is personal, ensuring that every solution is customized to align with your goals.*



Let's build your financial future - call today  
**903-705-1137**