What Characteristics Do Our Clients Have?

Houston Wealth Management values the relationships we have with our clients. As a prospective client we assume that you are interested in determining if our firm is a "good fit" for your needs. We believe that a good fit is vital to a successful long-term relationship. Most of the clients we work with have one or more of the following characteristics or desires:

- Wish to gain more control and direction in their financial lives;
- Want to work with a adviser they can trust, have rapport with, and who puts their interests first;
- Want to gather and simplify their financial matters into a cohesive plan that can be clearly communicated to their loved ones;
- Willing to commit the time to meet with an advisor;
- Realize that they do not wish to spend a majority of their free time becoming their own financial advisor;
- Reject the typical financial services model where advisors are just salesmen in disguise;
- Understand the benefits of working with a professional;
- Are willing to pay a reasonable fee for advice and guidance;
- Know that they have ignored or neglected aspects of their financial life and willing to take action to correct things; and most importantly,
- Wish to focus on what is truly important to them.

If one, several or all of these characteristics describe you or your situation, please contact us and request a free "get acquainted" meeting here.