

Services for Single Topics and Limited Scope Projects

Houston Wealth Management may offer financial consulting services that focus only on a limited scope of services. For instance, some clients may only require advice on a single aspect of the management of their financial resources. Prospective clients should always understand that our firm always prefers to work with clients in a comprehensive manner, including delivering true wealth management services, financial planning and investment management. Therefore, these limited services will be offered at the discretion of our firm, and with both the transparency to and an agreement with the client.

Fees for these services will be based on our current hourly fees, but can also be set on a project basis. Our firm will present and receive the client's agreement with the method and amount of fees prior to performing these services.