

Planning is a Process

Financial planning is a *process* that involves taking an active role in your financial future. Our firm believes that proper financial planning is integral to the management of your financial resources. In today's uncertain economy, creating a financial plan helps you see the big picture and set long and short-term life goals, a crucial step in mapping out your financial future. We believe in the real benefits of the financial planning process, along with regular reviews and updates of the outputs of such planning.

Planning is Comprehensive

Houston Wealth Management delivers fee-only financial planning in a comprehensive way. We embrace an open and flexible approach because it is important to understand any aspect of a client's life that may impact their financial resources. A partial list of topics includes:

- Qualitative analyses of your story, values, experiences and life goals
- Current financial strategy and cash management
- Investment management
- Tax and Estate planning
- Insurance and Risk Management
- Retirement Planning
- Social Security Planning
- College and Educational Planning
- Charitable Giving