

At Houston Wealth Management our collaborative approach includes four basic steps that are further customized to the circumstances, goals, assets and objectives of each client. Financial planning services, investment management services as well as their combination into True Wealth Management will follow the same basic process: Understand, Develop, Implement and Assess.

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# STEP ONE:

Understand



Initial Discovery or review to both **define** and **clarify** goals



# STEP TWO:

Develop



**Analyze** goals and situation to **build** investment plan and strategy

**Review** and **adjust** strategy and assumptions

**Design** a **select**

an ongoing portfolio strategy

# STEP FOUR:

Assess



# STEP THREE:

Implement

