mutual pointe WEALTH ADVISORS

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Client-Focused Wealth Management

Mutual Pointe Wealth Advisors focuses on you and the unique set of financial circumstances you and your family face. Getting to know you and understanding your personal needs allows us to create a customized wealth management strategy aligned with your short- and long-term objectives. And by building a lasting, personal relationship with you, we are able to help you anticipate and plan for the future.

Strategies for Your Wealth Management Needs

Our experienced team will work with you to identify your personal needs and values, then implement and monitor a plan designed to help you pursue financial independence. Our wealth management strategies include:

- Retirement planning
- Investment planning
- Estate planning
- Tax strategies
- Business strategies
- Insurance Planning
- Gifting strategies
- Education planning
- Risk management
- 401k, 403B, 457 Plans

Independence Powered by LPL Financial

My firm is supported by the resources of LPL Financial, the nation's largest independent broker/dealer.* This relationship provides unbiased research and a comprehensive array of tools, resources and technology. Because LPL Financial has no proprietary products to sell, we have the freedom to offer you objective financial guidance and investment recommendations.

*As reported by Financial Planning magazine, June 1996-2013, based on total revenue.

*Securities offered through LPL Financial, member FINRA/SIPC

Our Approach to Your Personalized Plan

We use a client-centric process focused on pursuing specific milestones we create together. Our comprehensive planning process is designed to help identify your needs, implement your strategy and monitor it regularly to help you stay on course.

We invite you to call us at 713.480.0628 to schedule a free, no-obligation consultation and discover how we can help you pursue your financial goals.