MAKE YOUR FINANCES SIMPLE.
NO COMMISSIONS. NO TRANSACTION FEES.

For over 25 years M.C. Byrd Wealth Management has worked with private clients, families, businesses and 401k plans all over the nation with service as our primary goal. Scroll further down this page for a detailed description of the service our clients experience, and when you're ready you can schedule a meeting or teleconference using the button below.

Schedule a Meeting (http://www.mcbyrdwealth.com/contact/)

What Does A Long-Term Consultative Relationship Look Like?

✔

Regular access to an advisor

We'll be here during normal business hours.

Regular blogs

Monte writes blog posts regularly, explaining anything from macroeconomics to personal finance.

Monthly Custodian Statements

The asset custodians we work with will send you a statement every month with your account balance and performance.

Quarterly Performance Statements

We mail statements (digitally or physically) to our clients using Morningstar. Within these quarterly statements you can view your performance, asset allocation and Morningstar Fund Rating.

Client app

We developed an app for iPhone and Android devices that gives you access to your accounts, our staff, Monte's blog post and much more. You can download it by typing "MC Byrd" in the App Store or Google Play.

Regular checkups

When you become a client we establish your meeting frequency. During these meetings we'll discuss asset allocation, market changes and changes in your life.

Market Update Events

We hold market update events at multiple locations every year, in which clients and prospects receive a complimentary meal while enjoying a discussion of market conditions along with a Q&A session at the end.

Client Appreciation Events

On a lighter note, we have a client appreciation event every year in Houston. We invite an exceptional individual, usually from the Houston community, to come and speak to our clients, who enjoy a complimentary meal.

Download the M.C. Byrd Wealth Management App

(https://play.google.com/store/apps/details?id=com.mcbyrdwealth.satt&hl=en)

(https://itunes.apple.com/tj/app/m-c-byrd-wm/id1240744710?mt=8)

What Goes On Behind The Scenes?

Rebalancing

To keep our clients on track to reach their goals, we periodically rebalance their portfolios based on market conditions, fund ratings, change in managers and changes in clients' needs.

Tax Analysis of Portfolio

We examine the tax consequences of every portfolio and are conscious of its impact on a portfolio's health.

Income Planning

Adequately planning for retirement requires a reasonable estimate of your income needs. We do the math to project a reasonable retirement income given your current assets and projected growth rates in relation to your risk tolerance. We monitor these withdrawals while you are retired to ensure you are on track to meet your goals.

Financial Planning and Monte Carlo Simulation

Using eMoney, we create detailed cash flow projections of your retirement, taking into consideration current investments, contributions to retirement accounts, social security and retirement goals. Additionally, we can test the probability of meeting those goals using Monte Carlo simulations comprising 1,000 different scenarios.

Coordination with Your Tax Professionals

During tax season, we send documents to clients' tax professionals upon request, and are open to discuss any details directly with them.

Required Minimum Distributions

Those using qualified retirement vehicles (IRAs, 401ks, 403bs) are required to take minimum distributions from those accounts after reaching the age of 70½.

Regular portfolio monitoring

We take a fundamentals based approach to monitoring market conditions and allocating client assets, and we care deeply about minimizing downside risk.

Learn More (http://www.mcbyrdwealth.com/about-us/)

How Do You Become Our Client?

If you fill out the “Book an Introductory Meeting” form, one of our team members will reach out to you by phone or email (your preference) and schedule a meeting, either online, by phone, or in person. After your meeting is scheduled, here’s what you can expect.

Discovery

This meeting usually lasts around 15-30 minutes, but we'll usually allot an hour for it. In this meeting we examine your whole financial picture, discussing where you want it to be, where you are now, and then explore ways we can help you get there. If you want to continue the discussion, we'll ask for you to gather financial documents based upon your areas of interest.

Suggestions

Using the information we learned in the introduction meeting, we develop recommendations based upon your individual situation. If you want to make changes or see another scenario modeled, we can go back to the drawing board.

Implementation

Once you are satisfied with your financial plan and asset allocation, we begin the implementation process. Our onboarding team will walk you through the process of becoming a client with the requisite paperwork and signatures. We take your security and privacy very seriously, and our approach to confidential information reflects that.

Get Started (http://www.mcbyrdwealth.com/contact/)

Disclaimer

Investment advisory services offered through M.C. Byrd Wealth Management.

We are licensed to sell insurance products in the following states of:
Louisiana (LA), Texas (TX).

View Disclaimer Information (http://www.mcbyrdwealth.com/disclaimer/)

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