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IMPROVE YOUR FINANCIAL HEALTH

Lifestyle management, retirement planning, debt reduction and risk mitigation. You know they're important — but just like diet and exercise — making the best choices isn't always easy. While fads may come and go — sound, measured and consistent advice can make planning your financial future feel like second nature.

Yes, we'll ask you the hard questions. But we'll also give you real answers — along with the vital solutions and expertise you need to achieve a sense of balance, direction and peace of mind.



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OUR PROCESS

TRUST IN A PROCESS FOCUSED ON YOU

At the start of our relationship with you, we'll spend a full day learning about you and your goals. In addition to being the foundation of your step-by-step financial plan, this in-depth consultation will also serve as an integral part of the process every year going forward. Of course, you can also trust in our commitment to personalized service, like speaking directly with a member of our team via email or phone whenever you have questions or need advice.



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OUR SERVICES

FIND THE RIGHT SERVICES TO
STRENGTHEN YOUR CORE

If you've been trying to piece together a financial plan by stitching together services from a range of different accounting firms, payroll service providers and investment advisors, you know how frustrating and inefficient this can be. At Moss, Luse & Womble, LLC, we bring you all the pieces of the puzzle, all in one place.



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ADVISERS, CPAs, CFP®s

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cerely, a personal financial plan that only focuses on investments is unsustainable. We help you address the many aspects of creating a balanced, long-term plan for success, while ensuring that no key areas are starving for attention.

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processes related to buying a practice, starting a new practice, developing a partnership and providing long-term financial management has been our proving ground. This is what sets us apart and sets you on a course for success.

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Our comprehensive accounting, tax and payroll services aren't offered on a pick-and-choose basis. This is because these services are designed to work together. Offering one without the other would be like exercising only one side of your body.

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OUR VALUES

COUNT ON VALUES THAT ARE STRONG



Our sense of identity is as solid as our financial knowledge. We firmly believe that your success is our success, and we prove it by being:

Strategic

When your patients come to you, they expect an expert. When you come to us, we know you expect the same. That's why we focus on delivering well-planned, comprehensive, forward-thinking solutions.

Efficient

Each of our advisors handles fewer clients in order to foster in-depth relationships and provide outstanding service. This also allows us to assist with all of the decisions that go into building success.

Cost-Effective

We operate on flat-fee agreements that give you the flexibility to contact us as needed, without worrying about being nickel-and-dimed by additional hourly rate fees.

Honest

Avoiding the tough problems doesn't make them any easier to solve. We're willing to tell you the hard truths. We wouldn't be doing our job if we didn't. Sidestepping and sugarcoating are not allowed.

Caring

We'll get to know you as a person — your background, your interests, your family and all the things that matter — not just the numbers.



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WORK WITH NUMBERS PEOPLE WHO ARE REAL PEOPLE

In addition to being highly qualified and dedicated financial professionals, we are also parents, sports fans and community members. When you work with us, you'll quickly realize — we're not just numbers people, we're real people too.





Favorite Financial Term:

Sharpe Ratio

Best Financial Advice: Don't spend more than you make.

Favorite Quote: "Fill your mind with truth, your heart with love and your life with service."
– Dale Partridge

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Jackson McDaniel, Sr.
Planner

Favorite Financial Term:

Time Value of Money

Best Financial Advice: Set long term financial goals, but

Favorite Financial Term:

Contango

Best Financial Advice: Start today — your timeline is only getting shorter.

Favorite Quote: "For every minute you are angry you lose 60 seconds of happiness." –
Ralph Waldo Emerson

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Jeff Moss, Sr. Planner

Favorite Financial

Term: Luse-Moss Ratio

Best Financial Advice: If you want to work and save for 30 years, yet be retired and save

**Favorite Financial
Term:** "Write-off"

Best Financial Advice: Keep it simple.

Favorite Quote: "If I had asked people what they wanted, they would have said faster horses." – Henry Ford

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Dustin Nunley, Sr.
Planner

Favorite Financial Term:

Mod Port Theory

Best Financial Advice: Seek guidance from experts who have successfully grown wealth.



size of the fight in the dog." –

Mark Twain

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take." – Wayne Gretzky

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details that are vital. Little things
make big things happen." – John
Wooden

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Michael Womble, Sr.

Planner

Favorite Financial Term:

Managed Lifestyle

Best Financial Advice: Work

hard and spend less than you
make.

Favorite Quote: "One

hundred years from now, it won't
matter." – Unknown

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