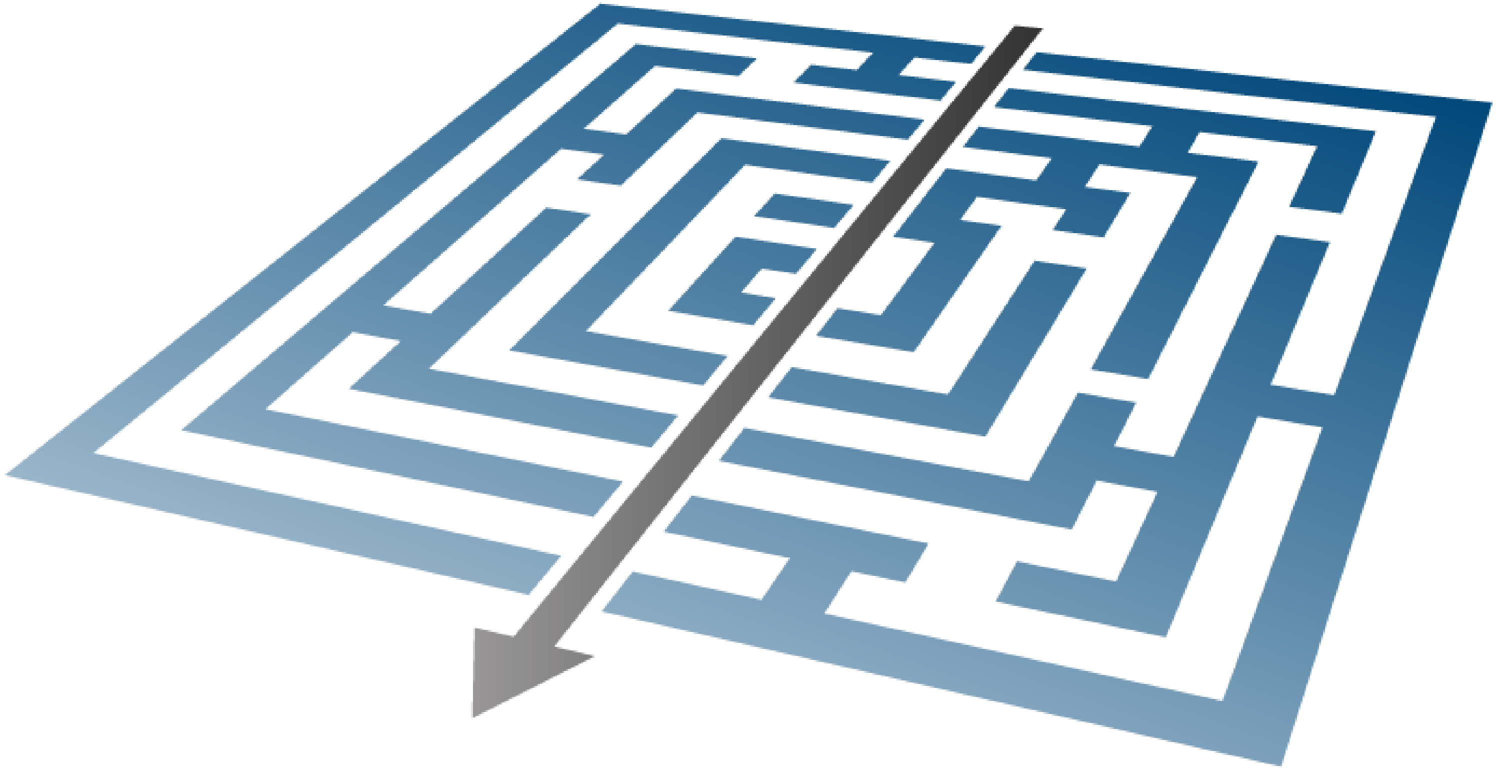


# MONEY DOESN’T HAVE TO BE COMPLICATED.

Are you confused by most financial advice? If so, you’re not alone.

What makes us different

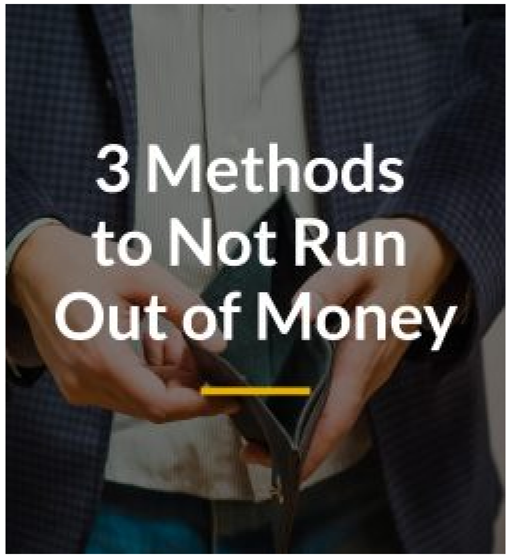
Schedule an appointment

Effective Game Plan

Advice in Common Language

Straightforward Fees

## Download one of our free g


3 Methods
to Not Run
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4 Common
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People Make
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Your First
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InvestmentNews ICONS & INNOVATORS

# People deserve to understand what's happening with their money.

Have you ever sat across from a financial advisor and only understood every third word they were saying? And yet they were talking about your money, your life, and your future.

At Retirement Planning & Wealth Management, we b
should u

that advisors should be just as good about explaining
they are at making them.

+ What are you going to do with my money?

+ Can you handle the complexity of my situation?

+ How can you make my life easier?

# Discover the right investment strategy for you.

Tell us a little more about your investment objectives and level of comfort with risk.

## By what percentage do you expect your portfolio to grow annually over the long-term (10+ years)?

0-2%

2-4%

4-6%

6-8%

More than 8%

Next

## How to get started.

1. Schedule an appointment

2. Meet with us for a custom listening session

3. Get your personalized strategy

Schedule an appointment

Watch video

Please provide your name and email and we will have an a

First Name*

Last Name*

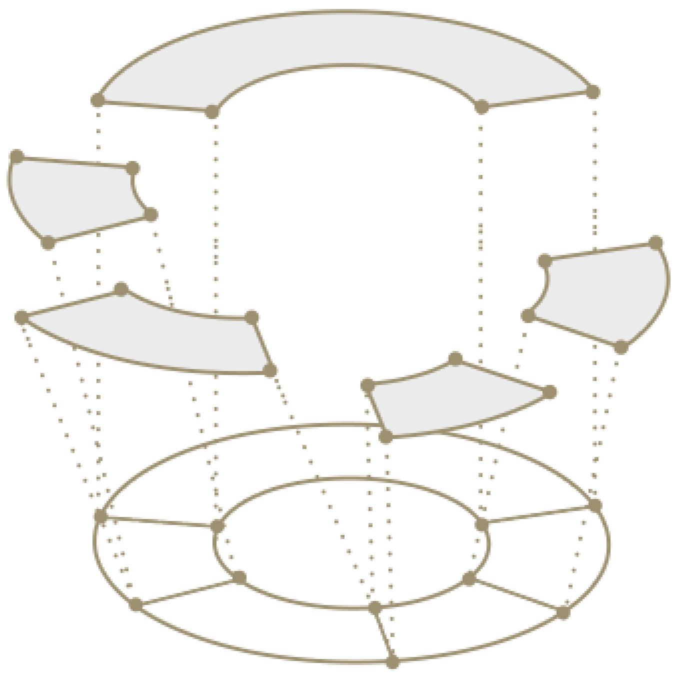
Email*

Phone Number*

Submit

# Our financial planning services are built on trust, transparency and accountability.

Our experienced team of professionals will develop a personalized plan that gives you the power – and a path – to realize your dreams. Explore services



# Personalized Wealth Management

Retirement Planning & Wealth Management's (RPWM) mission is to provide professional advice and consultation with a superior level of service and a dedication toward transparency and accountability. We are a wealth management firm in Lake Jackson, TX serving individuals, affluent families, business owners, executives and institutions. Our team provides a superior level of service for our local and national clients in financial planning and investment management. Contact us today and let Retirement Planning & Wealth Management help you on your True Wealth journey.

**Investment Management**

Disciplined investment strategies are the foundation of our investment management process. Our time-tested strategies are designed to meet a variety of investment goals and objectives.

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Carson Partners

Carson Partners is a network of growth-minded advisors wit
transformative purpose: to be the most trusted for fi

Read more

Our Locations

Retirement Planning & Wealth Management (RPWM) is a Lake Jackson-based wealth management firm. Contact us today to speak with a wealth advisor or financial professional.

Read more

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# Insights

Retirement Planning & Wealth Management's team of professionals provide you with transparent and proactive communications to equip you with the knowledge you need. Read more

News

## BUSTING THREE HALF-TRUTHS ABOUT REVERSE MORTGAGES

A few years back, I conducted and published research in the *Journal of Financial Planning* that showed Americans don't understand reverse mortgages. In fact, respondents scored below 50 percent on a 10-question true-false quiz.

Read more

Blog post

## HOW TO BUY A CAR WITHOUT LOSING YOUR MIND (OR YOUR WALLET)

**By Erin Wood**

Having to buy a car is like having a sliver stuck under my fingernail. It's painful and annoying, I know I have to deal with it, but it's going to take forever. Might as well pack a lunch too, because the second you decide you want to test drive something they have you trapped.

Read more

Weekly Market Commentary

## WEEKLY MARKET COMMENTARY – JULY 1, 2019

The S&P 500 slipped slightly last week after reaching a new high the previous week. The S&P 500 declined 0.3%. The MSCI ACWI inched 0.1% higher, and the Bloomberg BarCap Aggregate Bond Index rose another 0.4%. Yields continue to fall as expectations of an interest-rate cut mount.

Read more

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