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**MAVERICK**  
WEALTH MANAGEMENT

**(HTTP://WWW.MAVERICK-**

**WEALTH.ORG/)**



WE UNDERSTAND THAT YOUR FINANCIAL LIFE IS ABOUT YOUR ENTIRE LIFE, NOT JUST YOUR MONEY.



## ABOUT THE MAVERICK WAY

AT MAVERICK WEALTH MANAGEMENT, WE PRIDE OURSELVES ON OUR CLIENT-CENTERED APPROACH. OUR FOCUS ON EACH CLIENT'S PERSONAL FINANCIAL NEEDS IS OUR UTMOST CONCERN. ALL FINANCIAL ADVICE IS CUSTOM TO EVERY INDIVIDUAL NEED. WE HAVE SET CUSTOMER SERVICE AS A CORE VALUE, NOT BECAUSE IT IS GOOD BUSINESS, BUT BECAUSE IT IS THE RIGHT THING TO DO. YOU CAN ALWAYS EXPECT SOLID ADVICE AND EXCELLENT SERVICE. WE INVITE YOU TO EXPERIENCE THE MAVERICK WAY.

CHECK THE BACKGROUND OF INVESTMENT PROFESSIONALS ASSOCIATED WITH THIS SITE ON FINRA'S BROKERCHECK

Broker Check (<http://brokercheck.finra.org>)



# GO TO MEETING

COMMUNICATION IS KEY TO ANY GOOD RELATIONSHIP. THAT IS WHY WE SET UP THIS EASY TO USE SOFTWARE, SO THAT YOU CAN CONSULT ONLINE WITH YOUR MAVERICK WEALTH MANAGEMENT ADVISOR FROM ANYWHERE. SIMPLY CLICK THIS LINK AND ENTER YOUR MEETING PASSCODE TO JOIN IN THE DISCUSSION.



(<https://www.gotomeeting.com/join>)

**GoTo**Meeting

## OUR SERVICES



BUSINESS CONTINUATION ([HTTP://WWW.MAVERICK-WEALTH.ORG/?PAGE\\_ID=1519](http://www.maverick-wealth.org/?PAGE_ID=1519))

As a business owner, making sure your company stays up and running, regardless of what life or Mother Nature has in store, is of primary importance. Learn how to help protect against interruptions. Let us show you how your company might benefit from a Business Continuation Plan.





## SUCCESSION PLANNING ([HTTP://WWW.MAVERICK-WEALTH.ORG/?PAGE\\_ID=2158](http://www.maverick-wealth.org/?PAGE_ID=2158))

You have worked many years to build a strong company, but without a plan to transition your legacy, the business might fail. Don't take that risk. Many family-owned businesses fail to survive the transition from founder to second generation, typically falling prey either to estate taxes, family discord or both. Don't let your business fall into this trap; find out how you can have a plan in place.



## RETIREMENT PLANNING ([HTTP://WWW.MAVERICK-WEALTH.ORG/?PAGE\\_ID=2186](http://www.maverick-wealth.org/?PAGE_ID=2186))

You have heard the adage that "you do not plan to fail, you fail to plan." Planning for retirement is a perfect example of that phrase. Your entire life will be spent working hard to prepare for the big day when you will finally retire and enjoy the life you always wanted. Unfortunately, many Americans never get around to figuring out how they can live the retired life they have dreamed. With dozens of unanswered questions, most people just give up and hope for the best. That is not necessary. There are answers to the questions. With life spans increasing and medical costs increasing it is imperative to have a plan and know how to save for your big day. Don't travel the road towards retirement alone. It is never too late to plan. Maverick Wealth Management has your answers.



## RETIREMENT INCOME PLANNING ([HTTP://WWW.MAVERICK-WEALTH.ORG/?PAGE\\_ID=2193](http://www.maverick-wealth.org/?PAGE_ID=2193))

How much money do I need to have saved to retire? How can I make sure my retirement savings will last my whole retirement? Those questions have answers. Our advisors can create a personalized plan to help you feel confident when it comes to providing enough income to not only survive in retirement but enjoy it.



## COLLEGE PLANNING ([HTTP://WWW.MAVERICK-WEALTH.ORG/?PAGE\\_ID=2211](http://www.maverick-wealth.org/?PAGE_ID=2211))

It seems that our children grow faster and faster every year. Before you know it, they will be off to college. The sad fact is that college tuition rates continue to go up every year. Let the Advisors at Maverick Wealth Management come alongside and show you how you can have a financial plan in place to help work towards the college education you desire your children to have.



## ASSET MANAGEMENT ([HTTP://WWW.MAVERICK-WEALTH.ORG/?PAGE\\_ID=2181](http://www.maverick-wealth.org/?PAGE_ID=2181))



The Advisors at Maverick Wealth Management take fiduciary responsibility seriously. All our advice is guided by our desire to make sure our client's needs drive each financial decision. We understand that your savings and investments deserve comprehensive advice and management. You can be assured that every strategy we put into place is unique and customized with your goals in mind.



## CASH RESERVES PLANNING ([HTTP://WWW.MAVERICK-WEALTH.ORG/?PAGE\\_ID=2176](http://www.maverick-wealth.org/?PAGE_ID=2176))

We live in uncertain times. Our economy has its ups and downs. Natural disasters seem to happen with more frequency. The job market appears to be constantly in a state of flux. What if you lose your job? Making sure you have enough funds to take care of your short and long term needs may be more important than ever. Having a solid plan in place that has these risks in mind could help ease any financial hardship that might affect you. Nobody wants these events to come across his or her path, but if it does, having cash reserves might help. Contact us today to help set up a plan.



## ESTATE PLANNING / GENERATION PLANNING ([HTTP://WWW.MAVERICK-WEALTH.ORG/?PAGE\\_ID=2198](http://www.maverick-wealth.org/?PAGE_ID=2198))

Did you know that you might lose half of your estate to taxes upon your death? How will a divorce affect the legacy you built for your children and grandchildren? How can you avoid family turmoil in the distribution of your assets? These are valid questions. You have worked too hard to not have a plan in place to help protect the estate you have built. Upon your passing, having a proper estate plan will go a long way to assuring that your final wishes, in regards to your assets, are fulfilled. Maverick Wealth Management and its partners can help guide you.



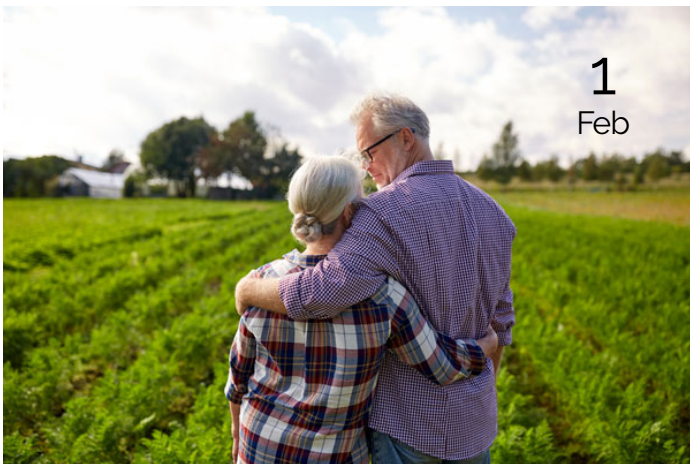
## CLOSING ESTATES ([HTTP://WWW.MAVERICK-WEALTH.ORG/?PAGE\\_ID=2204](http://www.maverick-wealth.org/?PAGE_ID=2204))

The passing of a loved one comes with an immense sense of loss and stress. Unfortunately, there is business that government agencies might demand within a short timeframe. There will be the payment of taxes, the transferring of assets and the payment of expenses, just to name a few responsibilities. Handling and administering a loved one's estate can be complicated, stressful and expensive. Having to deal with closing an estate is hard enough without dealing with the emotional stress of a loss. Be assured that Maverick can, and will be available to help guide you through this process, and lend as much aid as we can during this emotional time.



# INVESTMENT INSIGHT

ARTICLES ABOUT TOPICS THAT MATTER.



AS SEEN IN KIPLINGER, THE WALL STREET JOURNAL, AND TEXAS MONTHLY MAGAZINE ([HTTP://WWW.MAVERICK-WEALTH.ORG/?P=2733](http://www.maverick-wealth.org/?P=2733))




WHAT TO BE ON THE LOOKOUT FOR IN 2019 ([HTTP://WWW.MAVERICK-WEALTH.ORG/?P=2727](http://www.maverick-wealth.org/?P=2727))


👤 Admin (<http://www.maverick-wealth.org/?author=1>)


📅 2019 (<http://www.maverick-wealth.org/?tag=2019>), financial future (<http://www.maverick-wealth.org/?tag=financial-future>), new year (<http://www.maverick-wealth.org/?tag=new-year>)

📁 Articles (<http://www.maverick-wealth.org/?cat=34>)



 Admin (<http://www.maverick-wealth.org/?author=1>)

 kiplinger (<http://www.maverick-wealth.org/?tag=kiplinger>), press (<http://www.maverick-wealth.org/?tag=press>), texas monthly magazine (<http://www.maverick-wealth.org/?tag=texas-monthly-magazine>), wall street journal (<http://www.maverick-wealth.org/?tag=wall-street-journal>)

 Articles (<http://www.maverick-wealth.org/?cat=34>), News (<http://www.maverick-wealth.org/?cat=35>)

We work hard to earn the trust of our clients, and are constantly striving to better ourselves so that we can offer the best advice to our clients....

Read More > (<http://www.maverick-wealth.org/?p=2733>)

As we enter the last year of this decade we find ourselves in a familiar place to where we started the decade. In 2010 we were just recovering from t...

Read More > (<http://www.maverick-wealth.org/?p=2727>)

## CALL US FOR A CONSULTATION.

No matter what your situation or objectives, our experienced team will take time to understand your specific needs and recommend an appropriate solution.

[CONTACT \(HTTP://WWW.MAVERICK-WEALTH.COM/?PAGE\\_ID=144\)](http://www.maverick-wealth.com/?PAGE_ID=144)



