GENERATIONS
FINANCIAL MANAGEMENT

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As stewards of our clients' assets, we help our clients
create plans centered on their values and priorities

WHAT'S YOUR RISK NUMBER?

LEARN MORE

Generations Financial Management 3-D Process

Discover

Take inventory of where you are now and where you want to be.

Design

Develop a personal strategy based on your goals, values and objectives.

Deploy

Implement your strategy with an agreed upon timeline and actively monitor your progress while determining the next step.

Generations Financial Management 3-D Process

We begin each relationship with the 3-D process which allows us to get to know you and your situation, develop a strategy centered around your goals and values, and, once agreed upon, monitor the progress.

We want you, as a prospective client, to do your due diligence and look us up. Make sure our credentials are valid.
Check the background of investment professionals associated with this site on FINRA's BrokerCheck

To look up Kirby (James Kirby Webb) or Patsy (Patricia Gómez), type 'Kirby Webb' or 'Patsy Gómez' in the first Name box and 'Rockwall, TX' in the location box – the 'firm name' box can be empty. Kirby and Patsy should be the only searches that pull up, respectively.

MAJOR LIFE EVENTS

Life happens, it's unavoidable. Let's work together to build a comprehensive plan that will help you be better prepared for life's journey.

Growing Family

Growing a family comes with many challenges and blessings like having kids, buying a home, educational needs, life insurance, and debt.

Job Loss or Change

A change in job status requires many decisions, such as what to do with a 401(k), how to amend the family budget, possible relocation, and possible savings depletion.

Unexpected Disability or Death

Let us help you prepare in the event that life takes you on an unexpected detour involving a sudden death, disability, or illness to you or a loved one.

Retirement

Everyone's retirement dream is different. However, everyone will be faced with decisions, including income structure, cost of living adjustments, social security planning, healthcare and long-term care costs, and longevity.

START PLANNING

ADDED CONVENIENCE WITH SECURE VIRTUAL MEETINGS

In today's world, people are pulled in many directions – family, work, or school, to name a few. We offer secure meetings from your smartphone, tablet, or laptop in order to accommodate your busy life.

- Flexibility
- Accessibility
- Convenience

SCHEDULE A MEETING

FEATURED ARTICLES

Below you will find links to some educational articles with information about financial planning, investment basics, and risk management.

Please feel free to reach out to us if you have any questions about the information presented in the articles.

Financial Investments

With all the different types of investments available, it helps to have someone guide you through a process to determine which investments are appropriate for you and your situation. This article highlights the most common types of investments and their characteristics.

READ MORE

Financial Planning

Having a roadmap that identifies where you are and where you want to go on your financial journey is critical to the success and lifestyle that you strive for. A financial plan organizes the pieces of your financial "puzzle" to reveal the overall picture or goal. This article discusses the basic principles of a financial plan.

READ MORE

Risk Management

Risk means different things to different people. When you understand the risk involved with your investments (your risk number) it is easier to make the right decisions for you. This article focuses on the different types of risks investors face when investing.

READ MORE

VIEW MORE

ANY INQUIRIES ABOUT OUR SERVICES OR HAVE A QUESTION?

CONTACT US

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