A Full Circle Approach With You at the Center

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ABOUT LPL FINANCIAL

For more than four decades, the firm has served as an enabling partner, supporting financial advisors in their goals of protecting and growing their clients' wealth.

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BEDROCK INVESTMENT APPROACH

360 Wealth Management is built upon these fundamental principles: sensitivity to expenses and taxes, proactive asset management, a transparent fee structure, and a measured approach to risk.

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PLANNING PROCESS

"At 360 Wealth Management, it is our goal to provide wealth management that encompasses the 360 degrees of your life and gives you the freedom to live it."

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360 Wealth Management

At 360 Wealth Management, we believe in being different. We look at each client's needs from a fresh perspective and take equal measure of both the challenges and opportunities our clients face. We combine the strength of financial planning with a disciplined approach to wealth management. We're independent advisors so our recommendations are based on what is most suitable for our clients and not by proprietary products or biases.

Whether you are growing your own business or non-profit, looking ahead to find ways to safeguard your family's future, developing a detailed retirement income strategy, or crafting a family legacy- our firm has the accumulated knowledge to help you reach your goals. We look forward to helping you make the most of your wealth and preparing you for the unexpected with our full circle approach.

Identify Goals

We will identify and prioritize your goals to understand your dreams at a deep level, because knowing your goals and aspirations will be essential to working with you towards those goals.

Gather Information

We will review and analyze important information to develop a comprehensive view of your situation. After reviewing your information, we will start to analyze your current scenario, identifying any risks and alternatives along the way

Propose Solutions

We will propose solutions tailored specifically to your needs that will help you work towards reaching your goals. Our role is to help you fully understand the risks in your portfolio and help you take action to mitigate those risks.

Track Your Ongoing Process

The most important part of the process is giving you the on-going support and accountability you need to reach your destination. We will set out a schedule to meet face-to-face or over the phone (depending on your preference) to keep you on track.

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The Value of Independence?

Ready to Make a Plan?

Life in a Box

Website Security?

CONTACT 360 WEALTH MANAGEMENT

Address:
17300 N. Dallas Pkwy, Suite 2065
Dallas, TX 75248

Main Phone: 972-421-1360

Main Fax: 972-421-1390

NAVIGATION