



An Investment Fiduciary



Helping Professional Pilots Retire Since 2004

401(K) Management | Distribution Strategies | Private Wealth Management

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Private Wealth Management





An Investment Fiduciary



Conveniently located at the IAH airport
at Atlantic Aviation

5 minutes from terminals

Private car service provide [Watch Our Video](#)

Call to schedule your complimentary
Retirement Plan evaluation



An Investment Fiduciary



Our Services

Customized Solutions for your Retirement Assets

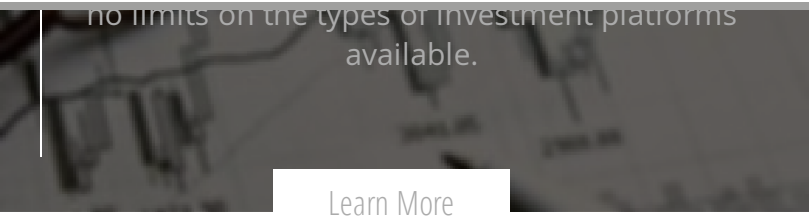
Wealth Planning

The types of wealth plans that we deliver to Pilot's are strictly dependent on the needs of the individual pilot and their family.

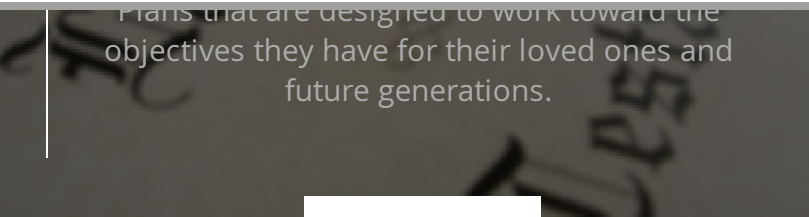
Wealth Management

We structure portfolios to coincide with your goals and priorities, and develop customized strategies to fit your short and long-term goals

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Getting Started

Our goal-oriented process follows the following comprehensive four-step approach.

Step 1: Discover

Discover Your Goals And Objectives.

Together we will work to determine your customized financial strategy, taking into consideration the following:

- ➔ Investment goals
- ➔ Time horizon
- ➔ Tax considerations
- ➔ Retirement dreams
- ➔ Charitable giving
- ➔ Risk tolerance
- ➔ Performance expectations
- ➔ Liquidity requirements
- ➔ Current investments
- ➔ Creating a legacy

Step 2: Recommend

Recommend Your Investment Strategy.

Accessing the expertise of experience research strategist, we will identify the most appropriate investment strategies, by taking into account the following considerations:

- ➔ Asset allocation models
- ➔ Diversification
- ➔ Investment types
- ➔ Investment managers
- ➔ Risk/reward characteristics of asset classes

Step 3: Implement

Implement Your Portfolio.

Next, we will begin building a portfolio of investment vehicles designed with a goal to address your specific needs. This process includes the following action items:

- ➔ Set realistic expectations
- ➔ Transition existing securities
- ➔ Determine types of ownership and beneficiaries
- ➔ Discuss source of funds
- ➔ Complete and sign all paperwork

Step 4: Review

Review and Manage Your Portfolio.

Once your investments are in place, the process of reviewing and managing your portfolio begins, which includes:

- ➔ Regular meetings and discussions
- ➔ Active ongoing portfolio reviews
- ➔ Periodic re-examination of your investment strategy
- ➔ Re-balancing decisions
- ➔ Consoli perform

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Retirement Process Checklist

Fact Finder Worksheet

Estate Planning Worksheet

Risk Tolerance Worksheet

Consulting Services Agreement

Healthcare Cost Assessment



“Helping fellow pilots retire in these difficult times that we face today is a rewarding challenge we are ready to face every day.”

Alex A. Tapia, AIF®,
President & Retirement Wealth Planner

Your Dedicated ARS Team

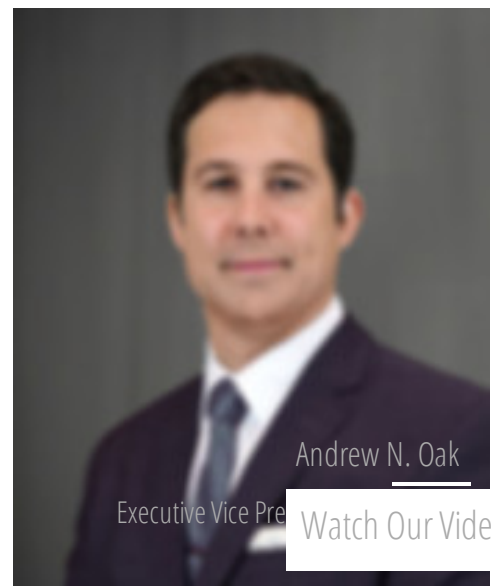
All of us at Aviation Retirement Strategies, LLC want to build a professional relationship with you based on trust and outstanding service.



Alex A. Tapia, AIF®
President & Retirement Wealth Planner
[View Details >](#)



W.C. Burgoyne
CFP®, CFS, AIF®
Director of Investment Planning
[View Details >](#)



Andrew N. Oak
Executive Vice President
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LPL Account View
Access Your LPL Accounts

LPL Account View

Wealth Management Portal
Your Personal Website For Anything Financial

Wealth Management Portal

Airline Resource
Access Your Benefit Resources

Airline Resources

Multi-Media

View Multi-Media

The Weekly Flyer

- Monday, June 3rd, 2019
- Tuesday, May 28th, 2019
- Monday, May 20th, 2019
- Monday, May 13th, 2019
- Monday, May 6th, 2019
- Monday, April 29th, 2019

ARS Monthly Podcast

- July 2018 - Market Strategic Update
- March 2018 - Market Strategic Update
- February 2018 - Market Strategic Update

Timely Topics

- Market Volatility Conference Call, February 7th, 2018
- Tax Reform

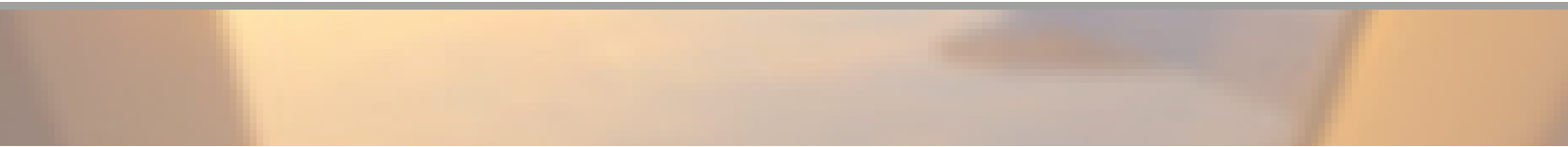
Crew Briefing

- Transitioning Into Retirement
- Faith In the Markets
- Social Security Dilemma...
- The Modern Baru...

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