Let our experience work for you. Echelon offers comprehensive fee based financial advice and investment management for individuals, retirement plans, and small businesses that is transparent and without conflicts.

WHO WE ARE

Echelon, founded in 2011, collaborates with its clients to provide objective, transparent financial advice and investment management. Echelon is bound to the fiduciary standard. We sit on the same side of the table with the client.

WHAT WE DO

Echelon is committed to helping their clients navigate today's sometimes tumultuous financial markets to protect and grow our clients' wealth.

Echelon Investment Management is a Dallas-based private wealth management firm that provides fee-based, customized client investment counsel, based on the client's business, wealth and retirement goals. Echelon's mission is to consistently enrich our clients' lives by identifying, preserving and achieving their established financial and wealth objectives. Echelon's team of experienced, knowledgeable and trusted advisors work hand-in-hand with clients to ensure every investment decision supports our clients' futures.

Trust is the number one determinant of success in any relationship. For years, Echelon has worked to earn our clients' trust. Our team cares about the individual dreams and goals of our clients. We always put the clients' needs first and conduct business with integrity, honesty and truth. When new clients team up with our Echelon advisors, they benefit from one-on-one investment counsel expected from a boutique firm, as well as access to robust technology and services from Echelon's custodial partnership with Charles Schwab Institutional Services including 401K PCRA accounts, and our relationship for ORP and 403(b) account management with Fidelity Management.

In addition, Echelon's customer service is exactly what our clients expect… nimble, knowledgeable and personal. Our clients know our advisors on a personal level and investment decisions are made only after the advisor understands the client's financial position and goals and how to best address those needs. Investing with Echelon is truly a team undertaking. We believe by working effectively together, we will glide across the finish line of financial security.


SERVICES

We offer investment advice tailored to meet the unique needs of each client. Our role is to serve as our clients' trusted advisor for specific investment needs or for their overall financial position.

What's at the finish line? The lifestyle our clients deserve now and in the future. Echelon's clientele of small business owners and their companies, entrepreneurs, successful corporate business leaders, including professional service providers and retirees, benefit from a robust platform of financial solutions, including:

Investment Management
Asset Management
Investment Advice
Retirement Planning
Alternative Investments for qualified investors including
select private equity and venture capital opportunities
401k's and other retirement plans including PRCA's
Optional Retirement Program (ORP) (http://echeloninvestm.wpengine.com/optional-retirement-program/) and 403(b)
account management for professional educators

PHONE: (214) 232-5974

HOW CAN WE HELP YOU?

Please do not submit confidential information.

NAME

EMAIL

COMMENT

SEND