TEAGUE & ASSOCIATES
Financial Consultants
Wealth Advisors
(/)

CREATING A FINANCIAL PLAN THROUGH

Trust, Integrity & Commitment

a personalized
Approach

a personalized
Method

a personalized

Answer

OUR SERVICES

See how we may serve you today

Retirement Planning (/retirement-planning)

Teague & Associates has a comprehensive approach to help you plan for retirement. While some portfolio management focuses on hypothetical rates of return, Teague & Associates will focus on a target “yield” and “income production” from your investments. Our financial advice focuses on retirement income planning, seeking to ensure that your spending needs will be met over multiple decades, even with future inflation.

Portfolio Management (/portfolio-management)

At Teague & Associates, we utilize some of the top research data services to guide the investment decisions that are implemented in our client portfolios. Our combination of economic and market research allows us to make well-informed decisions about where our client portfolios can be most strategically allocated. Our four-step consultative process begins with discovering your goals and objectives.

Full Service 401 K Support (/full-service-401k-plan-support)

As the sponsor of a 401k plan, the Employee Retirement Income Security Act (ERISA) requires you to meet a number of legal requirements and obligations. At Teague & Associates, we serve as an investment co-fiduciary manager to all types and sizes of 401k plans. We can provide a number of investment fiduciary services from limited advice and assistance as an ERISA 3(21) fiduciary, to full discretionary management as an ERISA 3(38) fiduciary, which alleviates plan sponsor duties and liabilities for this function.

Looking to learn more?

Get in touch today

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Additional info

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