3100 W. Southlake Blvd. Suite 110
Southlake, TX 76092

Preserving assets

You' ve worked hard to **build your assets**, allow us to help you preserve them. From finding way to reduce taxes, to holistic financial planning, let us **educate you** on your options.

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Security. Value. Peace of Mind.

Low Risk, Low Volatility, Peace of Mind Investment Management Solutions

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Where are you on your road to retirement?

Far from Retirement

Whether you need help with managing your wealth, setting up an investment plan, or putting together a savings plan for a lifetime goal, we can help you to plan and manage your financ...

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Close to Retirement

You are not alone heading towards your lifelong goal of retirement. We are here to help you make strategic decisions and enter retirement feeling more confident about your future, so...

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Already Retired

We'll help you make the most of your retirement working to preserve income producing assets and utilizing strategies aimed towards reducing taxes in the future. We want to he...

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Contact Information

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The information and calculators provided via this Web site are general information, meant to introduce you to our areas of expertise. Articles, calculators and other sources of information are not intended to replace the professional advice of a trained retirement specialist.

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Ed Slott's Elite and Master Elite IRA Advisor Group is an exclusive IRA study group of professional financial advisors with extensive IRA experience who have gone to the next level to study directly with Ed Slott on a continuous basis through full day workshops, the Elite forum and other regular communications and trainings.

Ed Slott's Elite and Master Elite IRA Advisor Group is designed to provide its members ongoing access to the most up-to-date IRA information for their clients. Advisors in the group are dedicated to being IRA distribution experts and have made a commitment to continue building their IRA knowledge base.