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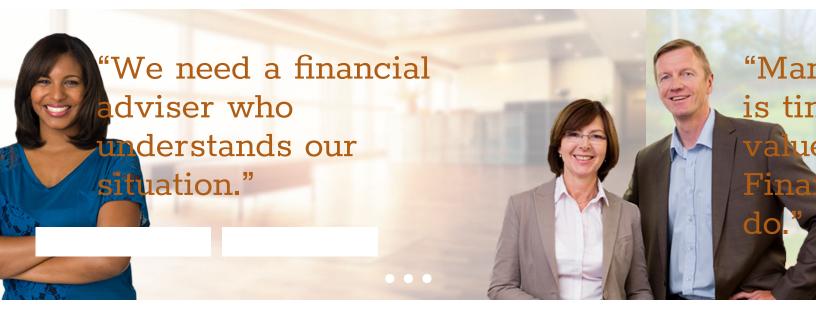
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clients in the Katy, TX area for years. Find out what makes us tick...

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T: (281)395-1021 info@trisperity.com

Trisperity Advisors, Katy, TX

At Trisperity Advisors, we are your home for financial planning in Western Houston! Our firm, conveniently located in Katy, TX, puts your interests first and is completely dedicated to helping you meet your financial goals. With a Certified Financial Planner (CFP™) on-staff, our clients benefit from our knowledge of the best strategies and investment options to help save for retirement, plan their estate, grow wealth, or provide considerations for their corporate 401(k) programs. Our team of investment advisers and tax planners in Katy is here to support your success.

Personalized Financial Services for Individuals and **Businesses**

<u>Trisperity Advisors</u> is a completely independent investment advisory firm and is one of the few firms that offers financial planning from a Certified Financial Planner in the Western Houston area! Because we are NOT associated with one particular bank, insurance company or brokerage firm, we

Featured Articles

Why Dave Ramsey Might Just Be Right About Using Only Cash

The truth is, most of us just don't have the self-discipline necessary to use credit cards responsibly. We live in an ad...

Your Canceled Debt Could Be Taxable

Generally, debt that is forgiven or canceled by a lender is considered taxable income by the IRS and must be included as...

have the flexibility to match our clients' unique financial needs with the very best investment solutions! Our individual and business services include:

- Financial Planning
- Investment Advice
- Retirement Planning
- Business Formation and Succession Planning
- Tax Planning

When you enlist our Katy financial firm to help you enjoy better financial health, you are given a truly personalized financial plan tailored to your current financial situation and geared toward your individual or corporate financial goals.

Financial Assistance You Can Count On

Since our founding in 2001, Trisperity Advisors has offered fee-only financial planning and investment management conveniently in Katy for the greater West Houston area. Because our Certified Financial Planners do not work on commissions, clients can trust that **every recommendation they receive is truly the best fit for their needs**. Our firm was founded to help individuals, families and businesses protect and grow their financial wealth; we take our commitments to our clients seriously. We spend time fully explaining the investment options available in plain terms, so that our clients can make informed decisions about their financial futures.

Questions? Contact our Financial Advisors Today

As a full-service financial planning and investment advisory firm, Trisperity Advisors offers a complete set of services for individuals and businesses. To learn more about our services, browse our website and call us to discuss your individual needs.

Please call us today — we'll be happy to offer you a free consultation. Thanks for visiting!

Learn more about our Financial Planning & Investment Advisory firm in Katy, TX...

Solution Center

What challenges do you face?

- "I need help planning my family's financial future."
 Learn More...
- + "I'm concerned about the financial markets and need a better investment strategy."
- + "I don't want to work forever but I'm not sure when I can retire comfortably."
- + "I'm OK with paying my fair share of taxes but no more than that!"
- + "I want a financial adviser that looks out for my best interest."





What to Do if You Receive an IRS CP2000 Notice

An IRS CP2000 notice is mailed to a taxpayer when income reported from third-party sources such as an employer does not ...

Trisperity Welcome Video:

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