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Simplify Your Financial Life

Independent, objective advice for building lifelong wealth. Complete integration of all aspects of your financial life, giving you peace of mind to pursue your dreams.

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individuals, families, and businesses.

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"We don't just manage money. We integrate all aspects of your financial life, enabling us to advise on your whole picture."

We understand that financial management extends far beyond just handling your assets, and we're with you every step of the way. You deserve a financial advisor who understands your goals, to ensure you'll receive prudent, well-rounded advice.

We take a holistic approach, and combine financial planning and investment management to provide Total Wealth Management for our clients.

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Specialty Programs

In addition to our traditional wealth management services, we also offer two specialty programs.

The Retirement Salary®



Our proprietary retirement income strategy. Income that lasts a lifetime.

Pathway®



Our financial planning and investment program for young professionals.

Your Fiduciary Advisors

We're a team of Certified Financial Planner[™] professionals delivering objective advice and total wealth management. As fiduciary advisors, we adhere to the highest legal and ethical standards,

and put your interests ahead of our own.



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Financial Advisor Houston



Check out our company video and meet the team!

Let Us Simplify Your Financial Life

Financial Planning

Planning your financial future is a life-long process. We'll be with you as your life evolves.

Evidence-Based Investing

We build investment portfolios based on the science of the financial markets. Decades of research guide our strategy.

Ongoing Management

Rest easy knowing we'll keep you on track by managing your investments and monitoring your financial plan.

Unlimited Support

We'll meet with you regularly in-person, by phone, email, or whatever is most convenient. Your advisor is here to help.

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Recent Articles and Ne



Timing Isn't Everything

July 8, 2019

Over the course of a summer, it's not unusual for the stock market to be a topic of conversation at barbecues or other social gatherings. In fact, it's pretty common these days!

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Check Out The 2019 Two-Minute Tour!

July 1, 2019

Check out the 2019 Two-Minute Tour! Although we've been in the new office since last fall, some of you have not had a chance to see the new space yet. So, we're pleased to release our latest Financial Synergies Wealth Advisors office tour!

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June 28, 2019 Weekly Market Recap

June 28, 2019

The S&P 500 declined 0.3% this week, but still increased 6.9% this month to record its best June since 1955. Price action reflected some consolidation in front of the G-20 meeting between President Trump and President Xi after Friday's close.

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