PartnersInWealth is a pioneering financial advisory firm in Houston, Texas serving financially successful families and individuals. We have refined our singular focus on the business of wealth management since 1984. The firm employs a balance sheet approach that considers every aspect of a family's assets, liabilities, and personal circumstances to maximize wealth now and for future generations. If you have any of the following challenges, we may be able to help.

Your Partner for Financial Peace of Mind

Do You Face These Challenges?

Lack of a Plan

Without specific, actionable goals and a plan to achieve them, you and your family may not reach your full financial potential.

Missing Opportunities

Disjointed and narrowly focused financial advice from multiple sources can fail to maximize your family's financial situation.

Lack of Organization

Disorganization can lead to a lack of control and reduced confidence in your financial future, with costly consequences for your family and future generations.

Absence of a Sounding Board

Without a trusted and knowledgeable confidant with whom you and your family can discuss financial questions and ideas, you may worry and make costly mistakes.

No Holistic Oversight

With no single advisor quarterbacking your overall situation, you may miss opportunities such as tax reductions, higher returns on investments, and optimal transfers of wealth.

Incomplete Legacy Planning

There may be unintended consequences if the tangible and intangible aspects of your philanthropic and legacy planning are not well thought out and communicated with your family and other recipients of your wealth.

Here's How We Help

Velcome to a different type of advisory ervice—the PersonalCFO.

The PersonalCFO is our innovative response o the challenges facing financially successful households such as yours.

Comprehensive Planning

We craft a plan that is detailed, integrated, proactive, and continuously monitored to get you and your family on course and keep you there today, tomorrow and across generations.

Continuous Oversight

Your PersonalCFO provides proactive management of your total balance sheet to optimize its many moving financial parts and to liberate you and your family from life's financial burdens.

Organization & Control

Your online Dashboard gives you access to your complete financial picture, while your Vault securely stores your important documents electronically. Both tools are available 24/7 from anywhere in the world.

Generational Partner

As your trusted confidant and guide, we understand that your wealth is perpetual and meant to benefit future generations. We therefore equip your family and other beneficiaries with the education and structure necessary to care for your wealth in a way that would make you proud.

Big-Picture Perspective

With uncompromising attention to detail while maintaining a big-picture perspective your PersonalCFO recognizes opportunities and implements them to maximize your results. Collaboration with your other valued advisors is a key part of the process.

Uniquely Qualified

We have a laser like focus on one highly specialized service. If our PersonalCFO approach appeals to you and we are fortunate enough to work together, you can be assured of receiving world class expertise and service.

Learn More

Searching For a Wealth Manager?

Identifying a wealth manager who fits your needs may seem like searching for the proverbial needle in a hay stack. How do you know who to trust? How can you be assured the advice given is right for you?

If you are serious about finding a really good advisor, our free workbook, *An Insiders Definitive Guide to Finding Your Ideal Wealth Manager*, may be helpful. The Guide offers step-by-step insights and know-how drawn from our three decades of experience serving financially successful clients. Once you read and work through the Guide, you will in all likelihood locate an advisor you feel really good about. Check it out. You will be glad you did.

Download

The Latest

5 Traits of a Qualified Financial Sounding Board

Most people appreciate the benefit of having a sounding board - someone they can bounce ideas off - for decision-making purposes. The opportunity to “think out loud” and get feedback from

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Why You Worry About Your Wealth and What You Can...

The financial services industry is well equipped to assist wealthy families and individuals with traditional financial concerns like tax reduction, investing, insurance, and estate planning. But how

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