Horizon Wealth Advisors is a Houston-based, privately owned, **fee-only financial advisor** established in 1999. Our partner CPA firm **Maddox, Thomson & Associates, P.C.** has served Houston's high net worth since 1985.

Our mission at Horizon Wealth Advisors is to develop long-term relationships with thoughtful, successful individuals, families, and organizations by supporting and assisting them in achieving their financial goals.

Our Process.

Becoming a Horizon Wealth Advisors client begins with a series of meetings and a great deal of behind-the-scenes work by our team to gain a deep understanding of a client's unique family and financial circumstances. We follow an organized process for all new and existing clients.

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Understand.

Our first goal is to understand you, your family, and your overall financial circumstances. We start by gathering and analyzing all the relevant financial data and planning documents. We then dedicate time to understand your goals for the present and for the future.

Organize.

Once we have thoroughly assessed your financial matters and personal objectives, we organize everything in a manner that provides for clear and understandable recommendations. We do this by preparing a comprehensive study of your current financial situation and then creating a forecast to determine the likelihood of achieving your goals. We then work with you to develop an implementation strategy.

Manage.

Once we have agreed on a strategy, we manage the process for you. We execute our investment strategy and carefully tend to the needs of your portfolio. We continuously monitor your plan and update it to ensure you are staying on course. Circumstances change, and financial plans must be flexible to accommodate the inevitable twists and turns in life. We will work with you throughout the changes and make sure you continue to progress towards your goals.

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We are your long-term partner.

We work with successful professionals who are accumulating their wealth, as well as retirees who seek to maintain their current lifestyles and preserve their wealth. We believe that financial decisions are best made in the context of a thoughtfully considered plan. The foundation of our wealth management process is to understand, organize, and manage our clients' wealth for the long-term.

As a full-service wealth management firm, we offer the following services as part of our comprehensive and collaborative wealth management process.

- Financial Planning
- Estate Planning
- Retirement Planning
- Education Planning
- Investment Management
- Tax Services
- Charitable Planning
- Estate & Trust Services

Learn more about how we can help you.

Services

Our Principals

Larry Maddox, Joe Thomson, and Owen Murray are the principals of Horizon Wealth Advisors and have many years of experience serving clients together.

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Larry Maddox CFP®, CPA

Partner, President

As Partner and President of Horizon Wealth Advisors, Larry works with clients in all facets of the wealth management process. He collaborates with our wealth management team and other external advisors to provide comprehensive wealth management services.

Joe Thomson, CPA

Partner, Vice President

Joe co-founded Horizon Wealth Advisors in 1999 in Houston, TX with his business partner, Larry Maddox. Joe's primary focus at both Maddox, Thomson & Associates and Horizon Wealth Advisors is client relationships, consulting, and income and estate tax planning.

Owen Murray, CFA

Partner, Director of Investments

As Partner and Director of Investments, Owen is principally involved in investment research and portfolio construction. Owen spends much of his time analyzing and managing Horizon Wealth Advisors' clients' investment portfolios and often participates in client meetings.

Meet the team

Frequently Asked Questions

HOW DO YOU GET PAID?

DO YOU PROVIDE "HOURLY" FINANCIAL PLANNING?

ARE YOU A FIDUCIARY?

WHAT SERVICES DO YOU PROVIDE?

WHAT TYPE OF CLIENTS DO YOU HELP?

WHAT IS YOUR INVESTMENT APPROACH?

HOW OFTEN ARE YOU IN CONTACT WITH YOUR CLIENTS?

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We are a **NAPFA** Member Firm and are included in the registry for the **Institute for Fiduciary Standards**.

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Learn about our affiliated tax services firm **Maddox Thomson & Associates P.C.**

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