

Client Portal

LIFE MOVES PRETTY QUICKLY

Preparing now is the first step to financial freedom. Speak with us today to plan for tomorrow.



Hello There.

Meet Our Team



David T. Brunson, CFA, CFP®, CDFA

President



Lacey Garcia CFP®, CDFA

Chief Compliance Officer / Director of Operations



Trey Touchstone, CFA, CQF

Vice President / Director of Investment Management

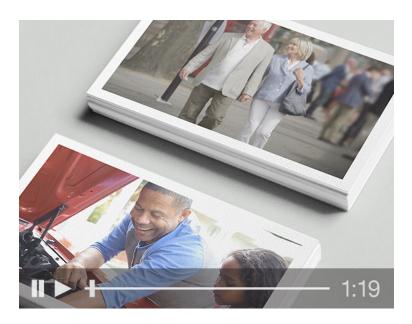


Dallas McKee, CFP®

Vice President / Director of Financial Planning

Helpful Content

Curated articles, videos, and more for a more financially savvy you.



RE: Retirement

How does your ideal retirement differ from reality, and what can we do to better align the two?



The Cost of Procrastination

Don't let procrastination keep you from pursuing your financial dreams and goals.

Learn More



Will Power

Preparing for the eventual distribution of your assets may not sound enticing. But a will puts the power in your hands.



Retiring the 4% Rule

A portfolio created with your long-term objectives in mind is crucial as you pursue your dream retirement.

CALL

Office: 972-378-3677 Fax: 972-378-4988

VISIT

7160 Dallas Parkway Suite 520 Plano, TX 75024

CONNECT

connect@lifewayfinancial.com

The content is developed from sources believed to be providing accurate information. The information in this material is not intended as tax or legal advice. Please consult legal or tax professionals for specific information regarding your individual situation. Some of this material was developed and produced by FMG Suite to provide information on a topic that may be of interest. FMG Suite is not affiliated with the named representative, broker - dealer, state - or SEC - registered investment advisory firm. The opinions expressed and material provided are for general information, and should not be considered a solicitation for the purchase or sale of any security.

Copyright 2019 FMG Suite.

Disclaimers