TRI-STAR ADVISORS

Wealth Management Focused on Cash Flow & Principal Preservation

FIND OUT MORE

Call us at 713-735-9200
or
Have one of our financial advisors reach out to you.

* *Indicates required field*

Email *

REQUEST MORE INFORMATION

Current Clients

Our advisors leverage industry-leading technology to help you consolidate your financial life and make fully informed financial decisions.

ACCESS YOUR WEALTH MANAGEMENT PORTAL

Our Services

Tri-Star Advisors is a Houston-based, fixed income focused, wealth manager dedicated to providing customized financial guidance. We understand your life has many moving parts and we take time to coordinate with your accountants, estate attorneys, lenders, insurance agents, and family members to provide comprehensive financial planning and sophisticated portfolio management.

Wealth Management

Our investment advisors work in teams to build solutions customized around the client's unique goals. We leverage leading technology to incorporate a client's business interests, investment assets, liabilities, cash balances, income sources, tax history, insurance policies, real estate, family members, spending habits, planned expenses, estate planning goals and all of the other factors necessary to paint a holistic financial picture.

Once the plan is established, the investment advisor acts as the client's Chief Investment Officer, coordinating the implementation and ongoing management.

Fixed Income Investing

Client portfolios are customized based on the client's goals and tax status. Portfolios predominantly utilize fixed income securities - municipal bonds, collateralized mortgage obligations, corporate bonds, structured notes, and certificates of deposit - with allocations to stocks and alternative investments as appropriate.

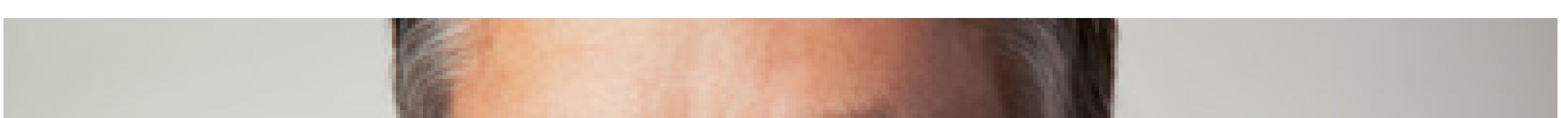
Investing in individual bonds will require sufficient funds to enable an investor to diversify across several different issues to ensure a reasonable amount of diversification and liquidity. To achieve the full benefit of owning a diversified portfolio of bonds, an investor should have at least $500,000 to invest.

We Take a Team Approach

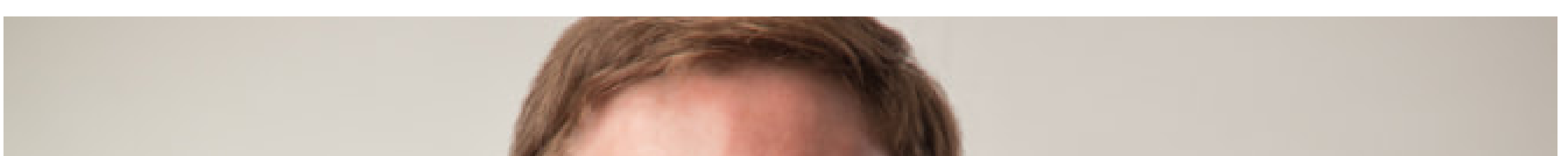
Tri-Star Advisors' team members have extensive experience managing wealth and navigating the financial markets. We invite you to do your research, learn more about our firm's investment philosophy, and sit down for a consultation.

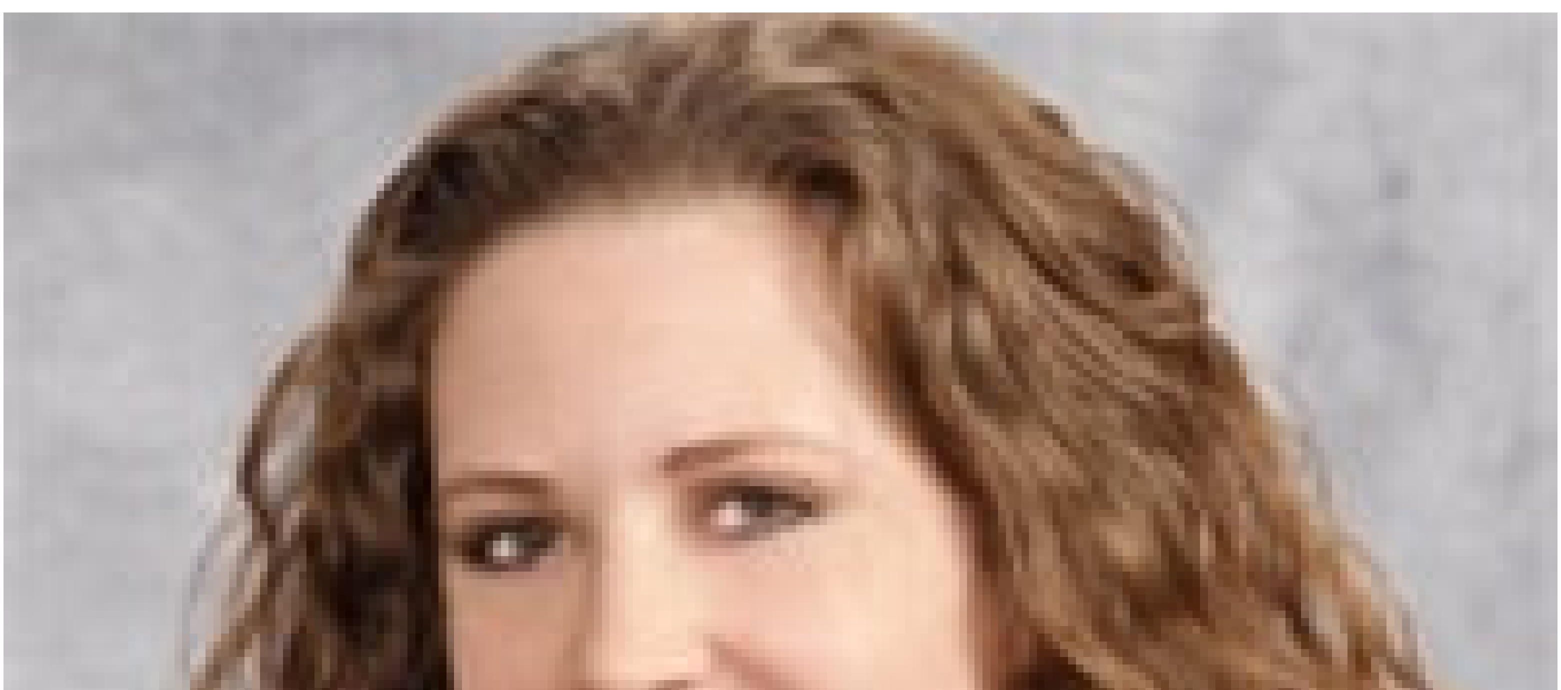
Research our team members using
BrokerCheck by FINRA

MEET SOME OF OUR TEAM MEMBERS









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About Us

The mission has always been to use our fixed income expertise for the enhancement of our clients' financial lives. We are disciplined, objective, and provide uniquely personal guidance for investors seeking cash flow oriented portfolios. We recognize the critical importance of producing returns, but our primary goal has always been to achieve this performance while also delivering comprehensive solutions that help our clients' sleep easier at night.

Houston Office

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Houston, TX 77057

713-735-9200

HOME

SERVICES

TEAM

DISCLOSURES

CONTACT

Securities offered through Calton & Associates, Inc., member FINRA / SIPC. Tri-Star Advisors and Calton & Associates, Inc. are separate entities. Tri-Star Advisors is not engaged in the practice of law or accounting. All investment strategies have the potential for profit or loss.

Tri-Star Advisors, Inc. is registered as an investment adviser with the SEC and only transacts business in states where it is properly registered, or is excluded or exempted from registration requirements. SEC registration does not constitute an endorsement of the firm by the Commission nor does it indicate that the adviser has attained a particular level of skill or ability.

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