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**\( (281) 354-7861** 

Financial Advisors in The Woodlands, Texas, providing excellent client service and in-depth market knowledge. Locally owned and serving Investors for over 30 years.



## What Makes Our Companies Unique?

We are two, independent, boutique financial service companies who have built lasting client relationships and grown our business with their referrals.

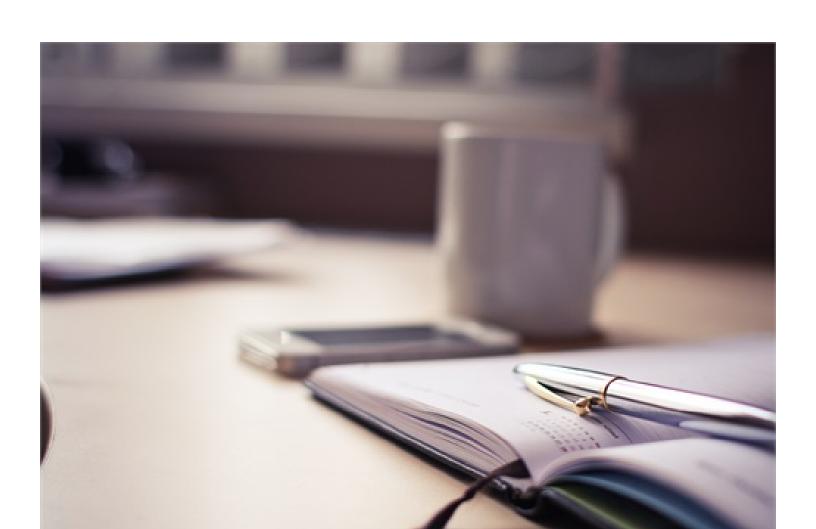
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## **Our Team**

Over the years, we have found that a team approach can be an effective method to help clients who have a wide variety of needs as they maneuver through a complex financial services world.

**MEET OUR TEAM** 



### **Contact Us**

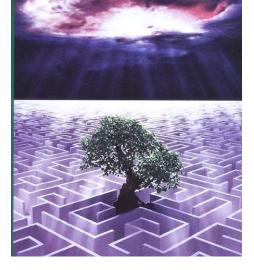
We invite you to discover and experience the power of our services. We believe it has far-reaching benefits for our clients to get opinions from several sources with diverse backgrounds, education, and experience.

**LEARN MORE** 

### **Our Services**

- Brokerage Accounts/ Hilltop Securities
- Asset Managed Accounts/ Schwab
- Retirement Accounts
- Direct Purchases Mutual Funds, Annuities
- College Planning

**LEARN MORE** 



# **Our Companies**

Our objective is to provide quality financial advice and build lasting client relationships.

#### **LEARN MORE**



# Request Appt/Info

Becoming a client with us is as easy as it is rewarding.

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#### **Contact**

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