Planning for a Life Well-Lived™

"FIVE STAR Wealth Manager
Austin, San Antonio, Central Texas"

Texas Monthly

Astoria Strategic Wealth is a Financial Advisor that provides Fee-Only™, fiduciary, financial planning and investment management services in Austin, TX and surrounding areas.

Our business is helping families and individuals achieve the life they envision. Acting as a fiduciary, we will partner with you to educate and guide you, as well as implement financial strategies designed to help you achieve your goals. As a Fee-Only™ advisor, we are your advocates working only for you, with no conflicts of interest associated with commissions, bonuses or hidden fees as we do not accept them. Nationally, affluent individuals and families have relied on our firm for wealth management planning and portfolio management for over 20 years because we understand that each client's needs and situation are unique to them.

We are extremely passionate about helping people make financial decisions that are in consonance with their principles, values and dreams as well as those of their heirs. We welcome the opportunity to show you how.

What does it mean to be a **fiduciary**? While there are literally 1000's of pages of legislation attempting to define this position (to which we are accountable), we also are proud to commit to these principles.

- Place our client's interests first - always.
- Be honest, forthright and transparent.
- Educate our clients so that they feel confident in making important life choices.
- Exceed continuing education requirements.
- Be proactive in disclosing any conflicts of interest that may arise.
- Accept no compensation from any source that is not derived directly, and as agreed upon, from our clients.

Articles, Blog Entries and Case Studies

June 30th, 2019 Market Recap (/june-30th-2019-market-recap)

Financial Markets – A Recap Of The First half 2019 Executive SummaryThe S&P 500 index produced a return of 17.35% in the first half of 2019, its best first half since 1997. June also marks the 121st month of the current economic expansion making this the longest economic expansion in U.S. History. Read More... (/june-30th-2019-market-recap)

Tue, July 2, 2019

The SECURE Act - What It Might Mean for You, Your Retirement and Your Heirs (/the-secure-act-what-it-might-mean-for-you-your-retirement-and-your-heirs)

Contrary to the name, the SECURE act is not related to recent news regarding our borders or immigration. Rather, it is pertinent to something much closer to home – your Financial Freedom years!While currently still in committee, based on bipartisan support and passage by a 417-3 vote in the House, it appears very likely that the proposed legislation will become law.Without getting mired in the details, here are a few major (potential/likely) changes:Required Minimum Distributions (RMDs) &n... Read More... (/the-secure-act-what-it-might-mean-for-you-your-retirement-and-your-heirs)

Wed, June 5, 2019

Top 10 Tips for Grads (and The Rest of Us) (/may-2015)

At Pauley Financial, our Principals are 20+ (in some cases 30+) years removed from graduation from college, but as we think about some of the more valuable lessons learned, understanding the time value of money stands out as one of the most useful. We have often said that this concept and other sound financial principles should be required to be taught at the high school level. Unfortunately, in most instances, they are not.Accordingly, we thought the timing was right to focus the following thou... Read More... (/may-2015)

Fri, April 12, 2019

More Articles, Blog Entries and Case Studies (/resources)

Our Services

Financial Planning (/what-we-do#financialplanning)

Investment Management (/what-we-do#investmentmanagement)

Defined Contribution and Benefit Plans (/what-we-do#definedcontribution)

Whom We Serve

Medical Professionals (/whom-we-serve#med)

Business Owners (/whom-we-serve#bus)

Independent Women (/whom-we-serve#ind)

Young Professionals (/whom-we-serve#you)

Mid Career Professionals (/whom-we-serve#mid)

Near Retirement or Retirees (/whom-we-serve#nea)

Privacy Policy and ADV Part 2A Disclosure Regulatory Documentation (/Websites/pauleyfinancial2/images/2019%202A%20plus%20Privacy%20Policy%20-%20Final.pdf)

Astoria Strategic Wealth is a **Financial Advisor** that provides Fee-Only™, Fiduciary, and Financial Planning in **Austin, TX**. We offer financial services to these cities and more in the Greater Austin: Austin, West Lake Hills, Bee Cave, Lakeway, and Round Rock, TX.

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