





Check the background of investment professionals associated with this site on FINRA's BrokerCheck

Jim Warring was interviewed by WMAL on the topic of "How to grow and protect your wealth".



Jim Warring Named Smart CEO Money Manager Of The Year



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What does your portfolio say about you? Are you Aggressive? Moderate? Conservative?

Take the Risk Tolerance Worksheet here to see what type of investor you are.

How Risky Are You?

Prudent investment and financial decisions must be made while considering taxes. And tax considerations must be taken into account when considering investment strategies. As both accomplished tax professionals and Certified Financial Planners, Eaglestone offers clients an integrated total financial solution that includes tax preparation and planning, wealth advisory, asset protection, and risk management.

Independent Guidance for the Financial Well-Being of High-Net Worth Individuals and Organizations

With the integrated services of EagleStone Tax and Wealth Advisors, you no longer need four different advisors. With taxes, investments, insurance, and estate planning all under one roof, the client no longer gets caught in the middle of four different offices.

As an independent wealth advisor and fiduciary, we offer unbiased guidance to clients without undue influence of any financial institution or product. We are financial stewards of client finances and our guidance is safely driven by what is in our clients' best interest.

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Special Reports



What are Long-Term Care Annuities?

You have concerns about long-term care but the prospect of paying costly premiums for insurance that you might never use is discouraging. There is a viable option for investors. REQUEST INFORMATION



Oil & Gas Investments Provide Diversification and Tax Deductions

While not as commonly understood as stocks, bonds and mutual funds, Oil & Gas Limited Partnerships provide portfolio diversification and offer tax deductions that may help to lower your overall taxes. REQUEST INFORMATION



1031 Exchange: A Great Way to Defer Taxes On Appreciated Real Estate

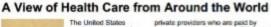
We have decades of experience dealing with the accounting, tax, financial planning, and legal issues related to 1031 exchanges. LEARN MORE

SECOND OPINION SERVICE:

Are You Completely Comfortable With Your Current Financial Plan?

Do you have even just a few naggging doubts about your financial strategy? Would you just like to confirm that you're on the right track? EagleStone Tax & Wealth Advisors offers a complimentary "Second Opinion Service" to help with your peace of mind.

SCHEDULE SECOND OPINION CONSULTATION





Types of health-care systems

The United States health-care system has been impacted by the Affordate Care Act (ACA). But how does delivery of health care in

the United States compare to that of other nations? And where does the United States rank with respect to the cost of health care per capita and as a percentage of gross domestic product?

The Out-of-Pocket Model, Used by the majority of countries, sociation Characteristics and an apercentage of gross domestic product?

The Out-of-Pocket Model, Used by the majority of countries, sociation Characteristics and another product the majority of countries. Including Characteristics and product the countries and those who cannot pay for care generally district receive care. not receive care.

The United States Model. The United States While each country has its own system of health care, most health care, most health care systems generally fall within the parameters of one of servicementains and valueans receive health

FINANCIAL NEWSLETTER

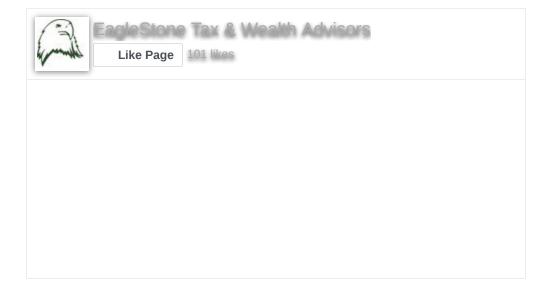
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As You Look Ahead, Do You Have a Clear Picture of Your Financial Future?

What's important to you and your family? What will it take financially to fulfill your vision? Are you confident your current plan will get you there? Doubt in your plan can lead to rash decisions that can negatively impact your financial position, both short and long term. If you have questions about your financial future, we invite you to learn more about our comprehensive experience and knowledge to help clients successfully achieve their financial goals.

CONTACT US TO LEARN MORE.

Connect With Us



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