FIDUCIARIES BY CHOICE

"Let us demonstrate what it means to be a 'true fiduciary' and why it should matter to you."

- Tom Rein, CPA / PFS
Managing Partner of WPWealth

WPWealth Services:

- Wealth Management
- Investing
- Estate Planning
- Financial Planning
- Insurance Services
- Qualified Retirement Plans

Serving You From:

Austin
3600 N. Capital of Texas Hwy
Bldg. B
Austin, TX 78746

Dallas
8343 Douglas Avenue
Suite 400
Dallas, TX 75225

Fort Worth
640 Taylor Street
Suite 2200
Fort Worth, TX 76102

Houston
3737 Buffalo Speedway
Suite 1600
Houston, TX 77098

Plano
5908 Headquarters Drive
Suite 300
Plano, TX 75024

Texas City
600 Gulf Freeway
Suite 226
Texas City, TX 77591

Contact Our Team

wpwealth@wpwealth.com

(817) 259-9100

WPWealth

Delivering Comprehensive Wealth Management

How Can a Financial Planner Help You?

wpwealth.com

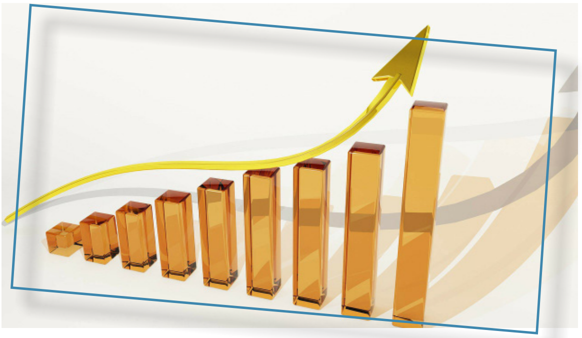
A FIDUCIARY CAN HELP YOU ANSWER THESE QUESTIONS

- Do I have enough to retire?
- How much should I be saving each year?
- Where should I be saving my money?
- How will inflation affect my retirement spending goals?
- How much should I save for my children's education?
- Will I outlive my money?
- Do I have appropriate insurance coverage? Is it the right type of insurance?
- Is my current advisor receiving commissions off of the products sold to me?
- What can I do to limit the burden of long-term care costs?
- What happens to my estate when I pass?
- Could my small business benefit from a pension or 401(k) plan design tailored for my needs?

Contact WPWealth to help you find answers!

Our team of CERTIFIED FINANCIAL PLANNER™(CFP®) practitioners and other credentialed professionals sets us apart from other financial firms by:

- Building and focusing on a plan aimed at achieving the client's goals;
- Understanding the power of comprehensive planning;
- Educating clients on maintaining a long-term horizon to accomplish goals;
- Coordinating seamless solutions with tax professionals;
- Delivering a high probability of success through a systematic, evidence-based approach to investing



NO MATTER WHERE YOU ARE IN LIFE, WE CAN HELP

WORKING TOWARDS YOUR RETIREMENT?

- Build a personal financial plan
- Manage investment accounts
- Provide guidance on 401(k) allocation
- Identify your risk tolerance
- Create & implement tax saving strategies
- Determine appropriate life insurance
- Review estate documents
- Establish education savings accounts

ALREADY RETIRED?

- Develop a tax-efficient plan for strategic withdrawals
- Utilize advanced charitable gifting strategies
- Plan for final expenses
- Address legal structures to fulfill your final wishes
- Consolidate accounts
- Build a plan to provide confidence in spending habits

SMALL BUSINESS OWNER?

- Design uniquely tailored qualified plan to maximize benefits
- Provide onsite enrollment and educational sessions for employees
- Build a succession plan to maximize benefit to owner
- Review debt structure for refinancing opportunities
- Fund buy/sell agreements between owners
- Identify insurance needs