HOUSTON FINANCIAL
PERSONAL FINANCIAL PLANNING

Take Control of Your Plans – No Regrets

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Northwestern Mutual®

What does Houston Financial do?

Helping business and personal clients create *intentional lifestyles* through proactive planning.

The Houston Financial Value Proposition

To change an individual, family or business experience in the financial product and service space.

Solutions & Services

- **Business and Personal Financial Planning**
- **Financial Security Products**
  - Disability Income Insurance
  - Life Insurance
  - Long-Term Care Insurance
  - Annuities
- **Trust and Private Client Services**
- **Investments**
- **Corporate-Owned Life Insurance / Bank-Owned Life Insurance**
- **Executive Benefit Plans**
- **Group Benefit Plans**
- **Qualified Retirement Plans**
- **Fee-based Planning**

The Houston Financial Team

Personal Financial Planning

Process

- Client Suitability
- Client Profile
  - Vision, Resources, Obstacles
- Wealth Optimization System
- Wealth Management Roadmap

Rules for Success

- Start with the End in Mind
- Consistency & Confidence
- Make it Relevant
- Highly Customized
- Flexible & Evolutionary

The Planning Horizon™

What & Why

Mission, Vision, Values & Goals

THE PLANNING HORIZON™

How, Who & When

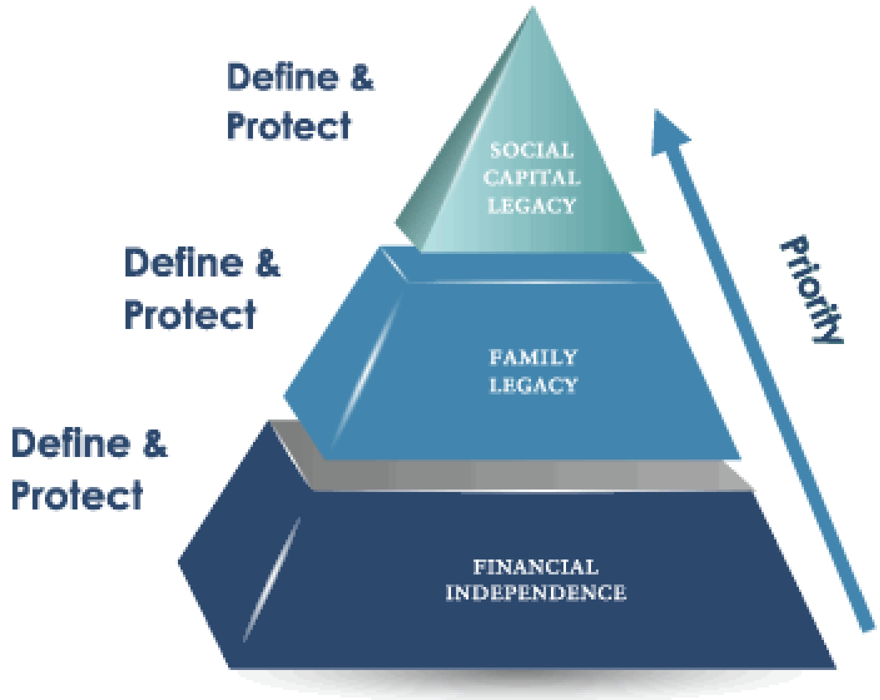
Strategies, Tactics & Tools

The Wealth Optimization System™

What & Why

Who & How

Create a Hierarchy of Importance



The Goal Pyramid™ Trademark material of The Legacy Companies, LLC

THE BEST WAY TO GET SOMETHING DONE IS TO BEGIN…

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