



# **HOUSTON FINANCIAL**

## ***PERSONAL FINANCIAL PLANNING***

*Take Control of Your Plans – No Regrets*

David L. Houston  
Wealth Management Advisor

Matt D. Houston  
Financial Advisor

6301 Waterford Blvd, Suite 410  
Oklahoma City, OK 73118  
(405) 879-8880

[www.houstonfinancial.nm.com](http://www.houstonfinancial.nm.com)

# 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



## How, Who & When

Strategies, Tactics & Tools

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# The Wealth Optimization System™

**VISION, VALUES & GOALS**  
What matters, and Why it's important.



**What & Why**

**Who & How**

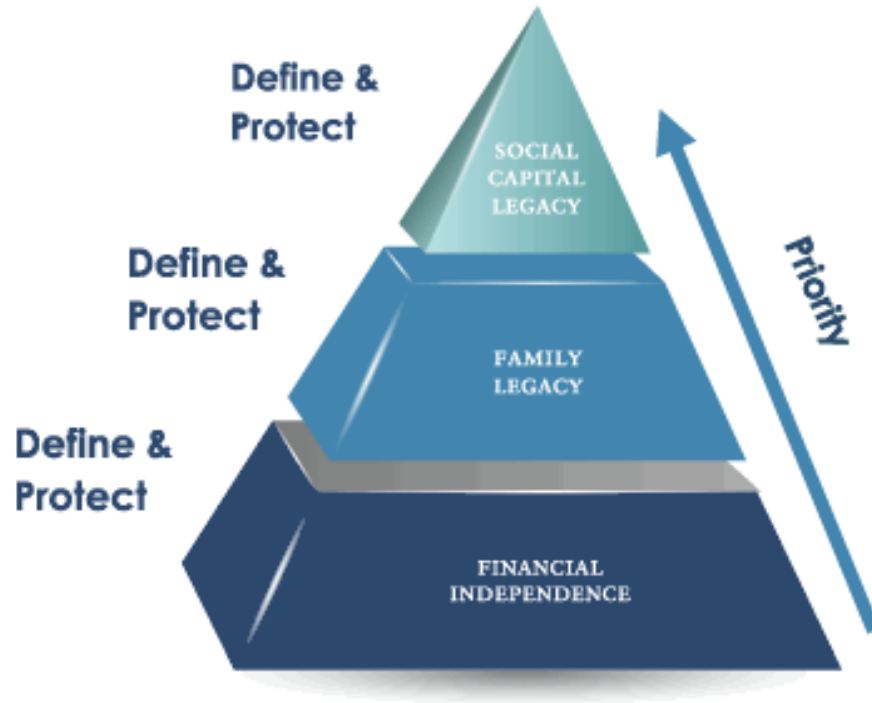
**STRATEGIES, TACTICS & TOOLS**  
How, Who & When to solve it.

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# Create a Hierarchy of Importance



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**THE BEST WAY TO GET  
SOMETHING DONE IS TO  
BEGIN...**

David L. Houston  
Wealth Management Advisor

Matt D. Houston  
Financial Representative



6301 Waterford Blvd, Suite 410  
Oklahoma City, OK 73118  
Office: (405) 879-8880  
Fax: (405) 879-8885  
[houstonfinancial.nm.com](http://houstonfinancial.nm.com)

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David L. Houston:  
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