# HOUSTON FINANCIAL

## *PERSONAL FINANCIAL PLANNING*

*Take Control of Your Plans – No Regrets*

David L. Houston

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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

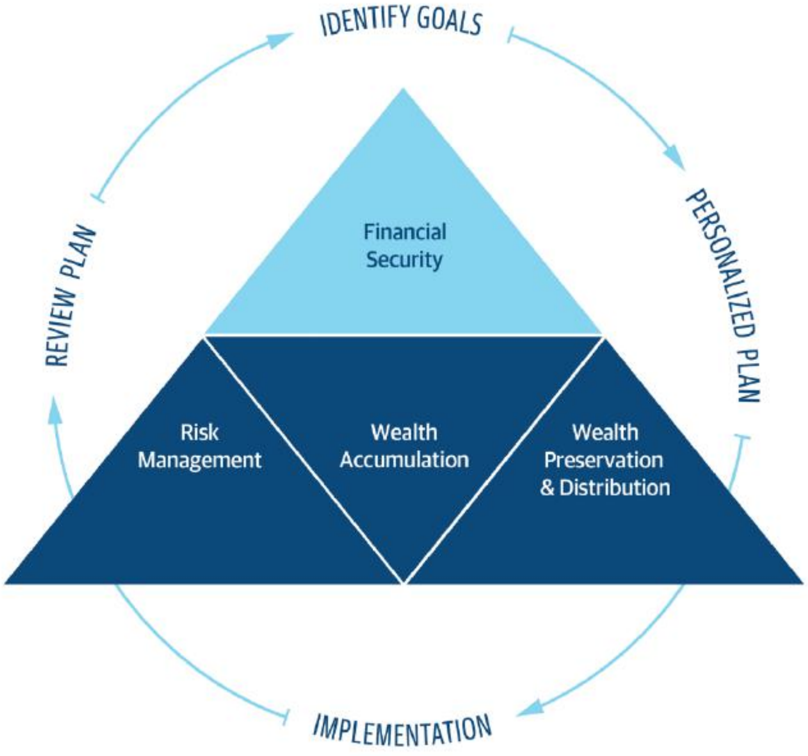
- Client Suitability
- Client Profile
  - Goals, Resources, Obstacles
- Develop a Personalized Plan
- Implement and Periodically Review Plan

## Rules for Success

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

# WHEN YOU WORK WITH US, THERE'S A BIGGER PLAN.

Your financial plan should be as unique as your goals. We'll work with you to create a personalized plan—one where investments and insurance work together to help grow your wealth while protecting everything you've worked so hard for.



# THE BEST WAY TO GET SOMETHING DONE IS TO BEGIN…

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