A Holistic Approach to Wealth Management

VIRTUS
WEALTH MANAGEMENT

VIRTUS
WEALTH MANAGEMENT

www.VirtusWealth.com

2535 E. Southlake Blvd., Ste. 100, Southlake, TX 76092
(817) 717-3812 • Toll Free (866) 407-4320 • Fax (817) 416-6585


Trusting someone with your money is trusting someone with your future.

Wealth Management

Successful wealth management extends beyond financial planning and investing. Wealth management is, by definition, a holistic approach to understanding and providing solutions to all of the major financial challenges of an investor's financial life.

What is Wealth Management?

Wealth management is more than just investment advice- it includes all aspects of a client's financial life. Clients benefit from a holistic approach by working with a wealth manager to coordinate and unify the decisions in their financial life, so that those decisions complement each other and produce enhanced results.

Three essential components of true wealth management:

- A goal-based process
- Customized choices and solutions
- Client partnership

The objective of wealth management is to seek strategies to:

- Reduce taxes
- Reach financial goals
- Preserve wealth
- Achieve legacy goals

Our approach allows us to look at the big picture and assess all the factors that affect your unique situation. A fragmented approach to finances leads to inefficiencies that can erode your financial future. More specifically, we would miss important key components that will affect not only our approach to your finances, but also the outcome. By bringing all of the various pieces together we will create a tailor-made, stress-tested plan that ensures you are confident in the potential of your financial future.

No strategy assures success or protects against loss.

Our Process

Our focus is to transform our clients' long-term dreams into realities. However, we believe it can only be accomplished through mutual participation and limiting our clientele to those willing to be involved in the process. We will do everything within our power to encourage, empower, and educate you.

Connect Wealth Process™

Connect With You

1

The beginning of our journey is getting to know your life, your family, your goals and anything else that makes you, you. This information is vital for us to customize and build the most appropriate strategy for you.

Your Risk Tolerance

2

We want to build a strategy that you are 100% comfortable with, so we will test your risk tolerance. Our systematic approach quantifies risk and helps us to better understand and meet your expectations.

Holistic Analysis

3

We understand that wealth management is so much more than managing assets. Our holistic approach also focuses on asset protection, tax planning, estate planning and any other areas that are pertinent to you.

Asset Protection

We create strategies that seek to protect your goals and dreams against unforeseen events such as market crashes, disability, and death.

Tax Planning

Tax planning with the goal of reducing your taxes both short-term and long-term. Our "What-If" analysis provides real options to help you reduce your tax liability.

Estate Planning

We provide an objective review of your estate plan. New tax laws have added huge risks to old estate plans.

Your Game Plan

4

We write a stress-tested plan that ensures you are confident in the potential of your financial future. Our mission is to help you get from where you are today to where you want to be in the future. Knowledge and planning is your path to empowerment.

Building Your Legacy

5

We will perform multiple reviews annually to ensure we are on track as your life and assets change. This keeps us connected with you and helps us continue to maximize the efficiency of your wealth.

Our Approach

We pride ourselves in providing an atmosphere of trust and warmth, which we believe encourages communication and results in a successful partnership. We also believe that our holistic approach will ensure that nothing in your situation gets overlooked.

Our Holistic Approach

In the long run, having a fragmented approach to your finances is inefficient, inconvenient and expensive for you. It also lacks accountability and consistency.

Our approach allows us to look at every pertinent aspect of your situation. This, in turn, allows us to create a tailor-made plan that takes into account your whole financial picture, coordinates and unifies your decisions, and strives to protect your legacy.


Let us help you start planning your financial future today!

VIRTUS
WEALTH MANAGEMENT
www.VirtusWealth.com

2535 E. Southlake Blvd., Ste. 100, Southlake, TX 76092
(817) 717-3812 • Toll Free (866) 407-4320 • Fax (817) 416-6585

www.VirtusWealth.com

2535 E. Southlake Blvd., Ste. 100, Southlake, TX 76092
(817) 717-3812 • Toll Free (866) 407-4320 • Fax (817) 416-6585