

Plan Well. Invest Well. Live Well.



When it comes to money, the choices we make today impact our entire lives. That is why it is so important to be actively involved in designing a clear plan and monitoring your progress. In your busy life, it can be overwhelming to identify opportunities, research everything, and make all the correct choices on your own. So where can you turn for help?

At Equistar, our goal is to improve your financial life by bringing **honesty**, **understanding**, and **discipline** to the financial choices you make. We believe you should work with **experienced**, **caring** people who tell you the truth and not just what they think you want to hear or what suits them best. We listen to you to understand what money really means to you, how you think and feel about money, and what matters most to you. With a complete picture of where you are today and where you want to go, we can help get you on the right course to achieve your goals, and to stay on course when life throws the unexpected.

Our client relationships are about more than return. There is no one-size-fits-all way to reach your goals. What matters is how comfortable you are investing, because choosing the right strategy for you will make it easier to stick to your plan.

Services

Equistar Wealth Management offers both **financial planning** and **investment management** services. Services are paid on a **fee-only** basis, which means we are only compensated by our clients and not incentivized by outside product providers or commissions. This ensures our interests are aligned with yours, to offer you the very best advice and solutions to reach your goals.

Most clients choose to retain us for ongoing planning *and* investment management services. This ongoing service is paid for with an asset-based fee. However, some who prefer “do-it-yourself investing” or are not quite ready for investment management services choose to hire use us for a one-time planning engagement. For planning-only services, we offer a flat-rate charge that covers as much time as it takes to get your plan right.

Please visit our website for more detailed information on our services and learn how we could help you live your best financial life.

Jenny Fleming
Jenny@eswealth.com

512.250.2277
www.eswealth.com

Sara Seely
Sara@eswealth.com