

Securing Your Future

**Investment Advice
& Management**

- Comprehensive, Goals-Oriented Wealth Management
- Strategic Asset Allocation
- Disciplined Portfolio Rebalancing
- Retirement Income Strategies

Financial Planning

- Cash flow Analysis
- Transition Planning
- Estate Planning

Asset Protection

- Evaluating Exposure
- Insurance Needs Analysis and Tactical Planning



Rich Judd
CFP[®], ChFC[®], CLU[®], CASL[®]
Certified Financial Planner
with 15+ years experience



RJuddWealth.com
(512) 522-7424

RJ JUDD

WEALTH MANAGEMENT

We strive to understand your needs from your perspective. We realize, it's not about money, it's about securing your future.

What We Do

We specialize in providing goal-oriented solutions to individuals, institutions, foundations and endowments. We provide discretionary investment management, financial planning, and asset protection services tailored to our client's specific needs.

What Makes Us Unique

Independence

As an independent firm, we are not influenced by proprietary product sales or corporate ties. But through our affiliate, TAM, we have broad access to research, operations and back office support.

From your Perspective

We view all financial matters from our client's perspective. This level of empathetic understanding is critical to our ability to provide clients appropriate solutions. We prepare and implement customized plans which will often integrate financial planning, investment management, estate planning, and asset protection strategies.

Our Vision

Our goal is to provide our clients financial peace of mind.

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