AM I THE RIGHT CLIENT?

NORTH TEXAS TAX & FINANCIAL

- Do I have a team of financial professionals behind me?
- Am I confident that I'm accomplishing all my financial objectives?
- I require my professionals to be accountable to me.
- Am I confident that my "family plan" will sustain my family in my absence?
- I require a better understanding, so I have confidence in my financial future.
- Do I have clarity of how I'm going to accomplish my overall financial objectives?
- Am I devoting the right amount of time for proper stewardship?
- I feel more secure with someone that has a different view of my finances.
- Are the things that I have done up until this point the right things for me?
- I tend to choose not to make financial decisions.
- Am I on track?
- I lack the discipline to stay invested when the market is erratic.
- I need the sound voice that I can vet ideas with.
- I haven't found a team of financial professionals that understand me and that are a good fit.
- I value professional independence and objectivity.
- I delegate responsibilities in exchange for the freedom of my time.
- I require access to the professionals that support me.
- I require good communication and clear explanations.

John W. Noey, CFP®, EA | CEO
North Texas Tax & Financial
5080 Spectrum Dr. #1200E Addison, Texas 75001
o +1.469.715.3520 | f+1.866.327.1039