

WALL TITUS

PERSONAL WEALTH MANAGEMENT

*Investment services provided by Wall Advisors, Inc.
A Registered Investment Advisor

Wealth management is more than just managing your investment portfolio; it's a combination of personal, emotional and financial decisions. Wall Advisors collaborative approach for private clients mixes investment management, tax, estate and financial planning services to reach your financial goals.

OUR VALUE

Our knowledge and experience, in addition to putting the client's best interests first, is our foundation to help you reach your financial goals.

- Collaborative investment, tax, estate and financial planning services
- Intimate knowledge of your personal and financial objectives
- A team of advisors dedicated to you and your family's financial well being
- An investment team directing all investment research and decisions

OUR PORTFOLIOS

Our portfolios are made up of traditional asset classes (equity and fixed income), as well as nontraditional alternatives. We create a portfolio that caters to your needs and risk tolerance and actively manage and monitor the portfolio to reduce downside risk.

OUR TEAM

Wall Advisors' team has the experience and industry knowledge to provide a variety of solutions. As a fee only firm, our team is not obligated to any funds or managers so that the client is the sole focus.



Learn more at WallTitus.com

*Investment services provided by Wall Advisors, Inc., A Registered Investment Advisor

ABOUT WALL ADVISORS

Wall Advisors, Inc. is a Registered Investment Advisor. Our focus is to provide expert personal service by fully understanding your financial goals. We strive to maintain the highest level of integrity, and our decisions and actions are driven by our commitment to do the right thing.

“We strive to help clients reach their financial goals. Having our clients know that we are always looking out for them and working on their behalf is of the utmost importance.”

-H. Lee Wall, CPA/PFS, CFP®
President
Wall Advisors, Inc.

EXPERIENCE THE WALL ADVISORS ADVANTAGE

INDEPENDENCE – we operate free from quotas, fund restrictions and proprietary products

DISCIPLINE – a driven approach with in-depth research and consistent follow through

RELATIONSHIPS – advisors committed to meeting your financial goals

RESOURCES FOR SUCCESS

Wall Advisors offers a variety of services to reach your financial goals, including:

- Comprehensive financial planning
- Retirement planning
- Investment management
- Life, disability and long term care insurance analysis
- College education planning
- Portfolio performance evaluation
- Collaborative tax and estate planning

We also provide additional business and financial services, including:

- Tax consulting and compliance
- Accounting and auditing
- Business consulting
- Succession planning
- Mergers and acquisitions

To find out how we can help, meet the Wall Advisors team at WallTitus.com or contact us at:

Office Phone 863.683.0708
Fax 863.686.0799
Email info@WallTitus.com

**WALL
TITUS** | accountants
consultants
wealth advisors

Learn more at WallTitus.com