



# FINANCIAL COLORS

## WEALTH MANAGEMENT

Florida Ph# (813) 603-4441 & Texas Ph# (469) 502-3552

Fax# (469) 422-6055

Email: [info@FinancialColorsWM.com](mailto:info@FinancialColorsWM.com)

Web: [www.FinancialColorsWM.com](http://www.FinancialColorsWM.com)

Florida: 411 Apollo Beach Blvd, Apollo Beach, FL 33572

Texas: 5700 Granite Pkwy Ste 200, Plano, TX 75024



**Joel Marius, RFC®**

Wealth Advisor & Investment Executive

Email: [Joel@financialcolorswm.com](mailto:Joel@financialcolorswm.com)

### Profile of Products & Services

Regardless of your stage in life, your income, or your goals, you need a plan to help you accurately manage your finances. Short-term, long term aspirations, daily expenses and insurance all come into play. How do you get it all under control? At Financial Colors Wealth Management, our professionals specialize in investments, insurance and comprehensive financial planning for individuals and businesses.

### Access to Investments

- Stocks, Bonds, Mutual Funds, Exchange Traded Funds, Etc.
- Structured Products/Market Linked CD's
- Professionally Managed Portfolios
- 529/Coverdell College Plans

### Individual/Business Retirement Plans

- Traditional/Roth IRA
- 401(k) & 403(b) Plans
- Profit Sharing Plans
- SEP, Simple IRA's
- Defined Benefit Plans

### Financial Planning Services

- Build, Maintain, Preserve Wealth
- Asset Allocation
- Tax Strategies
- Goal Funding
- Investment Planning
- Trust & Estate planning
- Wealth Forecasting
- Business Planning
- Family Finance
- Long-Term Care
- Education Planning
- Insurance planning
- Income Needs
- Budget Planning
- Marriage & Finance
- Risk Management
- Portfolio Assessment

### Insurance

- Annuities – Immediate, Fixed, Variable
- Life Insurance
- Long Term Care
- Key Man Insurance
- Business Life Insurance
- Disability Insurance