



**Laurence Egle, CFP®**

**Laurence@EagleHarborFinancial.com**  
**512-345-3057**

We provide comprehensive financial services that are tailored for each client's unique story.

We seek long-term relationships built on trusted advice.

Understanding your priorities helps us to organize financial resources, create future income streams, and develop growth and protection investment strategies that reflect your comfort level with risk and reward.

Where do you want to be?  
We can help you to get there.

**Eagle Harbor Financial**

*"Navigating Your Future"*



Securities offered through Avantax Investment Services<sup>SM</sup>, Member FINRA, SIPC. Investment advisory services offered through Avantax Advisory Services<sup>SM</sup>. Insurance services offered through an Avantax affiliated insurance agency.

3200 Olympus Blvd, Suite 100, Dallas, TX 75019  
972-870-6000



**EAGLE HARBOR**  
— FINANCIAL —

[www.eagleharborfinancial.com](http://www.eagleharborfinancial.com)

1490 Rusk Road, Suite 101 - Round Rock, TX 78665

## Wealth Management Services

- **Financial Plan\***
  - Goals and Risk Tolerance
  - Net Worth Statement
  - Future Uses of Resources
- **Investment Management\***
  - Stocks, Bonds, Mutual Funds, ETFs, Structured Products
  - Fee-Based Managed Accounts
  - Brokerage Accounts
  - Variable Annuities, Fixed Annuities
- **Cash Flow and Debt Management**
  - Emergency Savings Fund
  - Debt Analysis
- **Family Risk Management**
  - Life Insurance
  - Other Insurances
  - Long Term Care
- **Retirement Planning**
  - Business Retirement Plans
  - Roth IRAs, Traditional IRAs\*
  - 401k Rollovers\*
  - Variable Annuities\*, Fixed Annuities
- **Education Planning**
  - 529 Plans\*
  - UTMA's
- **Legacy and Estate Planning**
  - Beneficiary Review
  - Trusts
  - Asset Protection
  - Charitable Giving
- **Business Planning**
  - Business Retirement Plans
  - Business Succession and Transitions
- **Tax Planning**
  - Tax Return Review
  - Investment Tax Review