

TEXAS

FINANCIAL LEADERS

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Protecting Retirees' Lifestyles From the Unexpected

Texas Financial Advisory

Brooklynn Chandler Willy was trying to inject a little levity into a serious discussion. "The last time I checked, the mortality rate was hovering around 100 percent," she joked. "Still, I plan for my clients' retirement like they are going to live forever."

Despite her playful sense of humor, Willy couldn't be more serious when it comes to her clients' financial futures. As president of Texas Financial Advisory, an independent financial advisory firm specializing in the needs of pre-retirees and retirees, Willy works with clients to create a sustainable retirement income plan that seeks to protect their lifestyle from the unexpected. "We lay out a cash-flow plan so our clients will know where their money is going to come from for the rest of their lives," she says. "Our ultimate goal is to mitigate risk for our clients."

It's a mission born of Willy's own personal experience. Her father's sudden death when she was in college threw her family into chaos. Ironically, though he sold life insurance for a living, he had not purchased insurance to protect his own family. "I don't want other families to go through anything like this," she says. "Failing to plan can have disastrous consequences for both you and your loved ones."



Brooklynn Chandler Willy, JD, RFC, President

Keep More of Your Hard-Earned Money

According to Willy, the cornerstone to wealth accumulation is capital preservation. "We teach our clients how to preserve their assets, increase their income and reduce their income taxes," she says. "They've worked their whole life to get to where they are. Now is the time to protect it."

As a fiduciary, Texas Financial Advisory is bound by law to place clients' interests first. After talking to Willy for a short while, you sense she would do this even if she didn't have to. Earning and maintaining

clients' trust are of paramount importance to her and every member of her team.

"After you retire, you shouldn't have to worry about your income stream or the stock market or the next financial crisis. You shouldn't have to worry about how you're going to pay your grocery bills or meet your health care expenses. Retirement should be a time to sit on the front porch, travel or do anything else you want to do. And we're here to help you do just that at Texas Financial Advisory."



Brooklynn Chandler Willy, Spring Chandler Taylor, Drew Chandler Hennig

Sister Act

When Brooklynn Chandler Willy found herself with more business than she could personally handle, she turned to two of the people she trusts most in the world: her sisters. Drew Chandler Hennig is managing partner of the firm's Round Rock office and the firm's Medicare specialist. Spring Chandler Taylor manages its Victoria location. "I chose my sisters because they are replicas of me," Willy says. "I know I can count on them to provide the highest level of personal, professional service to every client."



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