ON COURSE

Enhancing Wealth Management Experiences Through Innovation

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WINTER 2025

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As an individual who has built significant wealth, you've likely encountered numerous changes throughout your life. Change is a powerful and widely discussed concept—one that you are undoubtedly familiar with, as echoed in well-known quotes: "Be the change you want to see in the world" (M. Gandhi); "The only constant in life is change" (Heraclitus); "To improve is to change, to be perfect is to change often" (W. Churchill). However, not all change leads to progress—without thoughtful intent, change can become a path to nowhere. True improvement happens when change is purpose-driven, creating meaningful innovation.

When it comes to managing your financial success, innovation is essential. A skilled wealth manager should serve as a trusted partner by delivering ongoing enhancements that provide greater personalization, improved efficiency, and more precise strategies to help you navigate your evolving financial landscape.

At Richard P. Slaughter Associates, we are dedicated to continually refining our True Wealth Management services to ensure you receive the highest level of value and meaningful client experience. We help our clients stay ahead of change through innovation and thoughtful improvement, ensuring they confidently meet their financial objectives. Here's how we are making a difference for the individuals and families we serve:

Smarter Financial Planning for Better Outcomes

The market has fundamentally changed, and our strategy has evolved with it. Technology has now caught up, and we have the right tools, products, and pricing structures to facilitate this transition. This enables us to align our investments more closely with our planning assumptions, ensuring a strong adherence to financial plans and making our projections more accurate.

Effective financial planning requires

more than just investment management. We utilize industry leading forecasting models and data-driven insights to support more intelligent decision-making. Our ongoing innovations in financial planning include:

- **Informed Decision-Making**: We leverage data and analytics to make more confident decisions about short-term financial actions and long-term goals.
- **Scenario Planning**: We prepare for different market conditions with tools that model various potential outcomes, ensuring clients are ready for a range of scenarios.
- **Holistic Planning**: Our comprehensive approach considers a person's complete financial picture, including investments, liabilities, income, and future expenses.

This well-rounded planning process keeps you on track while adapting to life's financial milestones.

Expanding Alternative Investment Options for Diversification

A well-diversified portfolio is essential for long-term financial success. We are focusing on areas that offer the greatest potential value creation, such as risk management, liquidity, and tax efficiency. Our refined approach to alternative investments broadens access to different asset classes, including:

- **Private Equity**: Opportunities to invest in private companies with growth potential not typically available in public markets.
- **Real Assets**: Investments in real estate, infrastructure, and commodities provide a hedge against inflation and contribute to portfolio stability.
- **Hedge Funds & Private Credit**: Diversified options designed to enhance risk-adjusted returns and potentially deliver steady performance in various market conditions.

Our approach ensures that portfolios are well-prepared for changing economic conditions while effectively managing risks. As we implement these enhancements, you might see an elevated number of trades, reflecting our commitment to optimizing investment strategies and achieving the best possible outcomes.

"Our priority is to support the evolving financial needs of every client with practical enhancements that deliver real value."

Partnering for Your Financial Success

Our priority is to support the evolving financial needs of every client with practical enhancements that deliver real value. At Slaughter Associates, we work closely with you to ensure our services and strategies are aligned with your goals. Whether through personalized investment options, diversified asset classes, or smarter planning tools, we are here to help you make the most of your financial journey.

If you have any questions about our recent enhancements or

ABOUT RICHARD P. SLAUGHTER ASSOCIATES, INC.

Richard P. Slaughter Associates is a leading wealth-management firm specializing in delivering tailored strategies as a fiduciary for high net worth individuals, families, and businesses. Slaughter Associates constructs a comprehensive financial relationship with its clients by delivering expertise in financial planning and asset management while coordinating with tax, insurance and estate professionals. The result is a holistic approach—unique in the financial industry—that generates a clear path to the individual financial goals of the client. Founded in 1991 in Austin, Texas, Slaughter Associates was among the first fee-only firms in the nation, a fiduciary status that allows it the freedom to provide advice that is always in the best interests of the client. Slaughter Associates is a NABCAP Premier Advisor, recognized for its commitment to maintaining top business standards, first-class financial-management capabilities and dedication to preserving transparency in the financial services industry.

EXPERTISE

Areas of Expertise
Specialization in comprehensive wealth-management services for families with over $1 million in net worth

Other Interesting Fact
One of the first fee-only advisor firms in the United States

want to explore how they can benefit your financial plan, reach out to one of our advisors today. Together, we can chart a path toward a brighter and more secure financial future.

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