



EMPOWERING BUSINESS WITH
ENTERPRISE SOLUTIONS





IBTX Wealth Management

Protecting your prosperity

IBTX Specializes in Wealth Management Solutions Including:

- 401k Planning
- Defined Benefit Plans
- Pension Plans
- Premium Financing
- Business Perpetuation Planning
- Key Person Insurance
- Buy/Sell Funding & Agreement Insurance
- Estate Planning
- Long-Term Care Insurance

IBTX delivers more than stability; we uphold a lifelong commitment to our clients. We designate a consultant to work directly with you to look at every angle of your business and personal life to help increase your bottom line. Through consistent review and communication, we remain relevant by readjusting your plan over time.

We assess your long-term financial stability by reviewing your accounting, tax, retirement and legal objectives. Based on these goals, IBTX designs an integrated wealth strategy plan for you. Combining our vast experience with the advice of your attorneys and accountants, we help maintain and often increase your financial status.

IBTX RISK MANAGEMENT APPROACH

IBTX provides comprehensive risk management services designed to meet the complete risk needs for you and your business.



IDENTIFY



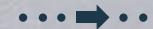
ORGANIZE



PRIORITIZE



EXECUTE



QUANTIFY