# About LHM Wealth Management

### Your Trusted Partner in Pursuing Financial Goals

LHM Wealth Management has been committed to providing personalized and comprehensive financial guidance since 1998. We proudly serve individuals, families, retirees, and business owners, helping them navigate the path toward their unique financial aspirations. Our core philosophy rests on a foundation of trust, education, and a deep commitment to placing your best interests at the forefront of everything we do.

## Our Approach: A Relationship, Not a Transaction

We believe successful financial planning stems from a strong personal relationship. Unlike firms that focus solely on selling a product, we take the time to understand your life, your needs, and your long-term objectives. Our founder, Harry Paez, began his distinguished career in March 1998 and built our firm on the principle of empowering clients. We provide clear explanations and disclose all necessary information, so you are fully informed and confident in your financial strategy before making any recommendations. This educational process means you know exactly what you own and, more importantly, *why* you own it.

We base our professional culture on a simple yet powerful set of values: being ethical, transparent, and always working in your best interest. This commitment enables us to develop sophisticated investment strategies, particularly in complex areas such as estate planning, to secure our clients' legacies.

## Unparalleled Service & Convenience

We make your convenience our priority. We understand your time is valuable, which is why we offer personalized visits to your home or office. Our long-term vision is to continue providing this exceptional level of customer service and adapting to meet your needs now and in the future.

We invite you to experience the LHM Wealth Management difference. We offer complimentary, no-obligation consultations to review your current financial portfolio, including:

- Investments & Brokerage Accounts
- Life Insurance Policies & Annuities
- Employer Plans (401(k), 403(b), 457(b))
- IRA and Pension Rollovers
- Assistance with Finding Lost Assets

If you are uncertain about your investment direction or feel you are not receiving the dedicated service you deserve, we look forward to talking with you.