

WEALTH
MANAGEMENT
SERVICES



King Investment Advisors, Inc.

Wealth Management Services

We face a complex and ever-changing financial world where an increasing number of investors seek professional guidance from an experienced, independent, fee-only advisor. Whether it is a comfortable retirement, funding college education, or leaving a legacy, KING's Wealth Management Services has helped our clients reach their financial goals with a proven investment approach, providing satisfaction and peace of mind.

Wealth Management Services (WMS) includes:

- Financial Planning
- Investment Management
- Portfolio Reporting
- Ongoing Client Communication

We coordinate our services with those of our clients' tax, legal, and other advisors.

Financial Planning Services

KING's WMS financial planning services include the following:

- Retirement Plan Analysis
- Portfolio Review and Asset Allocation Recommendations
- College Education Planning Analysis
- Lump Sum Distribution and Stock Option Analysis
- Statement of Net Worth and Current Cash Flow
- Life and Disability Insurance Analysis
- Estate and Trust Analysis

Other specialized planning is available upon request. KING does not offer legal or tax advice.

Investment Management

As a registered investment advisor, we have access to a wide variety of investments. We apply our expertise and market experience to construct low-cost, well-diversified portfolios—to help clients achieve their financial goals.

Investment Philosophy and Process

- Combines multiple asset classes to manage risk and improve long-term returns
- Manages portfolios with the same successful investment process that is utilized by large pensions and endowments

Investment Strategy

- Makes opportunistic portfolio adjustments based on economic and market factors
- Improves the probability of clients achieving their financial goals through continual research and monitoring of client portfolios

Portfolio Reporting

- Provides detailed quarterly client portfolio reports for monitoring progress
- Compiles annual reports to assist clients in tax return preparation



Client Communication

- KING believes that ongoing communication, coupled with client-focused service, are paramount in accomplishing clients' long-term financial goals.
- From introduction, clients are educated about our investment philosophy and process.
- Since financial situations and goals may change over time, our professional advisors will meet with clients periodically to review their plans and make adjustments as necessary.

Integrity, Experience, Client Service, Discipline, Commitment, Focus

- An independent, employee-owned firm
- Experienced financial planning and investment professionals, assisted by a dedicated support staff, providing customized solutions
- Integration of our Wealth Management Services into the existing alliance of professional advisors
- Flexible, low-cost investment options
- Proprietary research methods independent of Wall Street
- A proven long-term performance track record
- Individually managed private-client portfolios
- Tax-efficient strategies to increase wealth
- A commitment to high ethical standards and service

KING's WMS experienced advisors are dedicated to protecting and growing our clients' wealth.

THE FIRM

King Investment Advisors, Inc. (KING), founded in 1981, is an employee-owned investment services firm, based in Houston, Texas. We manage assets for individual and institutional investors nationwide. Our experienced professional advisors are focused on investment and financial planning services designed to achieve our clients' financial objectives.

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KING's Wealth Management Services incorporates a proven long-term investment process that is consistent with each client's personal goals. A close working relationship with our clients allows us to understand and keep pace with their objectives and develop appropriate portfolio strategies.

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As an independent, fee-only, registered investment advisor, we are committed to the highest ethical standards; KING places the interests of our clients first. At every level, we emphasize integrity, responsive personal service, and sound investment strategies—we manage our clients' assets as if they were our own.

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