



LIVE YOUR VALUES,
NOT SOMEONE ELSE'S.

THE ADVOCATES
DREAM IT. PLAN IT. LIVE IT.

SOCIETY SAYS, “You should do this, you should do that.”
But these decisions are personal, and they’re yours alone. We can help you organize your financial affairs to define and affirm what matters to you and what you want to do with your life.

HERE ARE THREE IMPORTANT THINGS WE'LL DO FOR YOU.

1. ACT AS YOUR CHAMPION

We endorse no compromises, and offer no stock solutions. We go to bat for your dreams. We're not satisfied until you're as close as possible to living them. We're not interested in what anyone says you should be doing at this stage in your life. Only what you want to be doing. That's all that matters.

2. ESTABLISH GENUINE EMOTIONAL HONESTY

Life is a mixed bag, full of good times and difficult ones. We sit side by side with you and look unflinchingly at the whole picture. Then we make a plan that prepares you for whatever comes. We do it with openness and honesty. Everything's on the table. You feel safe and calm. Once you have a plan in place, you'll feel clear and confident.

3. BECOME PART OF YOUR FAMILY

Family is the center of our lives. That's the level of commitment and caring we bring to the relationship. This is more than an abstract ideal. It's real. It's how we feel about our clients, and how they come to feel about us.

MEET YOUR ADVOCATES

When you work with us, you deal directly with our three founding partners. On these pages, you'll find a little background on each of them. Paul, Cole and Kurt are complemented by a tight-knit family of specialists who are equally dedicated to helping you live the way you want to live.



PAUL PALMER, JR., CFP

Paul grew up in Lake Charles, Louisiana. He earned his business degree from LSU in 1980 then moved to Dallas to work for Mobil. His next move was to Houston, where he worked as a credit analyst for a small bank and sold life insurance for Cigna. Along the way, he became more and more interested in helping people plan their financial futures. In 2006, Paul became a registered investment advisor. In 2012, he established the Advocates with Kurt and Cole. Paul's a family man who is deeply involved in the community.



KURT BOX, CFP

Kurt grew up in Bandera, Texas, where his high school graduating class had 100 kids. He was brought up to respect all people, no matter their upbringing or their job. Kurt graduated summa cum laude from Texas A&M, then earned his masters in finance. He started out as an investment banker, before deciding to devote himself to helping individuals and families. He met Paul at a professional function and soon the two became business partners. In 2012, Kurt joined with Paul and Cole to form The Advocates.



COLE CAMPBELL, CFP

Cole, the son of a minister, is a native Texan who's lived all over the state, from Houston to Midland, Pampa to Waco. He went to college in Huntsville and got his first taste of wealth management at Met Life. In 2012, Cole combined his own firm with that of Paul and Kurt to create The Advocates. Cole defines his success not by the number of dollars he earns or manages, but by the number of families he helps. His commitment to clients is matched only by his commitment to his community and to his faith.

YOU CAN'T JUST RETIRE AT 62 AND SUDDENLY BE HAPPY.

It takes a thoughtful plan. And an advocate. Someone committed to helping you live your values. That's what we do.

We sit down and put together a crystal clear plan for your life. One that takes into account not just your financial resources, but also your plans and dreams.

We do this with no formulas, expectations or pre-conceived ideas. The only thing that matters to us is that you live as closely as possible to the way you really want to live. We have the skills to help you do it.

We don't think of it as wealth management — we think of it as life management. Here are some of the things it contains:

- Retirement strategies
- Legacy and estate planning
- Pro-active tax planning
- Risk management
- Financial position
- Investment planning

WHAT NEXT?

You can learn more about The Advocates at www.youradvocates.com.

If you'd like to sit down for a low-key, personal conversation with us, call Paul Palmer at 713-827-8014, or email LetsTalk@youradvocates.com.

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