Prudent Stewardship

Trust Through Transparency

HILGER
WEALTH STEWARDSHIP OF
RAYMOND JAMES®

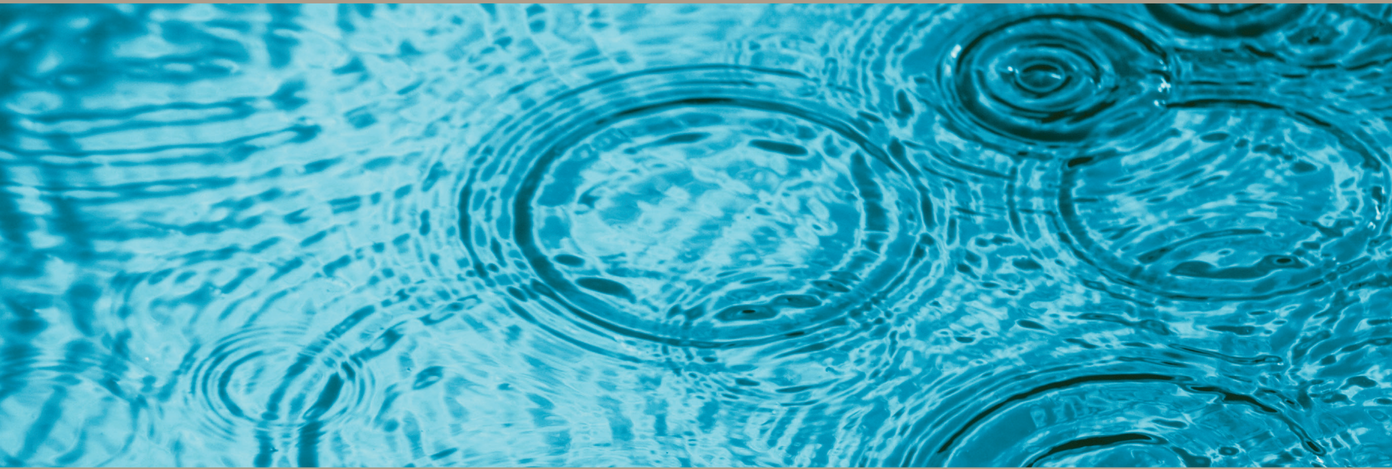
Wealth is a powerful force. We are your stewards.

Wealth is a unique force in our world – its capacity to create prosperity in people's lives is matched only by its ability to devastate when handled carelessly. And its impact reaches far beyond our own experience, shaping the lives and legacies of generations to come.

Because of all of this potential, we strive to serve as lifetime stewards of your wealth – managing it prudently and skillfully through the market's unpredictability and planning fully for everything it might become in the future.

From providing sophisticated wealth planning and asset management to building long-term legacy and charitable giving plans ...

We seek to create a straightforward strategy designed to help your wealth flow steadily from one stage of your life to the next.



Trust through transparency.

As our financial landscape grows ever more complex and clarity is lost to clutter, even the simplest investment goals can become clouded by fleeting trends and seemingly endless options.

To help you succeed in this environment we offer something simple, something fundamental – transparency. We will help you pull aside unnecessary complexities and convoluted tactics to reveal a simple, clear path to the future you've envisioned for your family.

We have one goal at Hilger Wealth Stewardship of Raymond James – to be prudent stewards of what we have been entrusted with.

Strategic planning is about bringing precision to the natural order of things.

We view wealth and the markets as natural resources – evolving over time, moving in cycles and, sometimes, shifting in ways no one could predict. So, helping you reach your financial and life goals is a matter of developing a clear-sighted plan designed to harness the momentum of the markets while managing the integrity of your wealth.

Following a thorough, fundamental process, we seek to:

Understand

We'll begin by getting to know you and helping you clearly define your unique short-and long-term financial and life goals.

Manage

Next, we coordinate the range of resources – financial, professional and technological – necessary to design and implement your plan, supplementing our efforts with the vast capabilities of Raymond James.

Integrate

Our team will then bring together the many facets of your financial life in a comprehensive plan designed to address current needs and help you achieve your goals for the future.

Monitor

Finally, we keep a close eye on the continuing success of your plan, making adjustments when needed to accommodate changes in your life or in the markets that might impact your goals, time frames or tolerance for risk.

Raymond James

In 1962, Bob James set out to build a different kind of financial services firm – one that put people, planning and principles first. And now, more than 55 years later, Bob's different kind of firm is one of the leading independent financial services companies in the United States.

Raymond James has grown to become a well-respected, widely recognized multinational firm with distinct business units that serve a variety of clients, from individuals and small business owners to municipalities and major corporations.

By the numbers*

- Over 7,700 financial advisors
- More than 3 million client accounts
- Over 3,000 locations throughout the United States, Canada and overseas
- Approximately $754 billion in total client assets

It's been our privilege for more than 55 years to support the goals of our clients and to give back to the communities in which we live and work – and we look forward to continuing to do so for many, many years to come. To take a "scroll" down memory lane, explore our history at RAYMONDJAMES.COM.

*As of 9/30/2018

Let us help you make your life and your wealth simpler.

At Hilger Wealth Stewardship, we earn trust through transparency and plan success with precision. Our mission is to help you pull aside complexity and define your goals clearly, to see through convoluted tactics and harness the momentum of the markets, and finally, to prudently manage the power of your wealth while preserving it for the future.

For over a combined 50 years, we've provided investment guidance and expertise to successful individuals, families and businesses – helping them clear the path to the futures they envision. Now, we'd like to do the same for you.

Prudent Stewardship

Michael Hilger, CEP®

Senior Vice President, Investments | Managing Director | North Texas Complex Manager

A securities industry veteran for over 30 years, Michael is a trusted advisor to his clients, offering clarity in an often unclear world and providing prudent guidance to help families manage their wealth and build lasting legacies.

In addition to his advisory duties, Michael serves as manager of Raymond James' North Texas Complex, which includes the firm's Downtown Dallas, Fort Worth, Duncanville and Southlake offices.

Michael has continued to enhance his knowledge and hone his skill, earning widely recognized industry credentials including the Certified Estate Planner™ and Investment Management Consultant℠ designations.

A native Dallasite, Michael still resides locally with his wife, Fran, and their two boys, Charlie and Brandon. Michael and his family worship at Watermark Community Church.

Jeanna Nalley

Senior Registered Client Service Associate

Jeanna believes the most rewarding aspect of her job is the relationships she builds with the clients she serves. Proactive and detail-oriented, she is an excellent problem solver and takes the time to give clients the dedicated, personalized support they deserve.

Jeanna began her financial services career with Smith Barney in 1995. She went on to hold positions with Rauscher, Pierce, Refsnes (now part of RBC) and J.C. Bradford (where she served as Michael Hilger's assistant), and joined Raymond James in 2000. Her industry certifications include Series 7, Series 63, Series 9 and Series 10 securities licenses.

Originally from Fort Worth, Jeanna currently resides in Midlothian, Texas, with her husband, Darrell, and their four children, Austyn, Morgan, Tyler and Owen.

WHAT WE BELIEVE …

Stewardship – the careful and responsible management of something entrusted to one's care. ~ *Merriam-Webster*

Celebrate Life Every Day

Deuteronomy 10:14

Live Modestly

1 Timothy 6:10

Save and Invest Prudently

Deuteronomy 8:18

Give Cheerfully

Proverbs 3:9-10

PRUDENT STEWARDSHIP

Everyone to whom much was given, of him much will be required, and from him to whom they entrusted much, they will demand the more.

Luke 12:47-48

All referenced links to websites are not endorsed by Raymond James.

Our Investment Philosophy
Wealth Stewardship

At Hilger Wealth Stewardship of Raymond James, we understand very clearly that we are only put in charge for a time.

Being a prudent wealth steward is a tremendous responsibility, both for the owner and those they might ask to manage it.

We prefer to focus on risk management, more so than wealth management, and believe that managing the risk can help allow wealth to become greater wealth.

Planning for catastrophic life challenges is paramount to wealth stewardship. Trying to anticipate what could go wrong can help us be prepared for when something might.

Wealth stewardship also requires communication … with our precious clients, and with the professionals that they work with. We focus on simplifying the process of managing one's wealth.

Wealth can be a wonderful blessing if we are prudent, and a curse if we are not.

Thank you for allowing us to be your wealth stewards.

HILGER
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