



Be prepared for the unexpected.

One of the only certainties in life and business is change, and managing that change is very challenging in today's economy. Planning for your personal and business financial future does not have to be fraught with uncertainty and stress. Let e FINANCIAL GROUP be on your side and we will work hard and get your financial life on a much clearer path to financial success. It is our goal to help you build a comprehensive plan that will adjust as your life changes, but ultimately will leave you believing that you are building a solid financial future. There is no time like the present to get started. Join us as we help people who are serious about their money to try and help to create, grow and protect their estate.

- Estate Planning
- Retirement Planning
- Investments
- Annuities
- Insurance
- Tax Planning and Consultation
- Managed Accounts

Determine the needs
Establish an investment plan
Review the results often

S E R V I C E S

ASSET MANAGEMENT

Professionally Managed Accounts
Institutional Asset Managers
Individualized Strategies
Fee Based

TAX CONSULTING

Tax Planning and
Construction of
Individual, Business,
Trust and Estates

RETIREMENT PLANNING

401K and IRA Rollovers
Age Based Strategies
Long Term Planning
Risk Tolerance Assessment
Retirement and Annuity
Distribution Planning

INSURANCE

Life-Term
Universal Life
Variable Universal Life
Annuities
Variable
Equity Indexed Annuities
Fixed and Immediate
Long Term Care
Disability

FIXED INCOME

Individual Bonds and
Securities
Structured Portfolios
Bond and Income Funds

BROKERAGE

Full Service Brokerage Accounts
Check Writing
Stocks, Bonds and Funds
Option Contracts



Start planning before the crisis arises.

At e FINANCIAL GROUP we know that the situations surrounding your decision to see us are not always ideal. Sometimes it's the loss of a loved one, a career change or some other life altering event that spurs the decision to scrutinize your finances. Sure we would like to see you well before that, but we can help you get things in order regardless of your current situation. We have a wealth of tools at our disposal along with experienced financial advisors who are ready to create a plan designed to meet your business and personal financial needs.

As long term care costs continue to rise, it is an essential part of your financial health to start reviewing the options today.

We're here to help you achieve your lifetime goals.

Simply put, e FINANCIAL GROUP is here to provide you with a customized strategy to help achieve the life you want. Call us today at 281-491-5100 to schedule your appointment, it's a great thing you can do for yourself and your family. It's our mission to help you create, grow and protect your estate.



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David A. Evans, CPA
Financial Advisor
e FINANCIAL GROUP
281-491-5100
www.efinancialgroup.com

P R O D U C T S

As an independent company we do not have any ties to particular mutual fund companies, insurance products, securities, or proprietary investments. This allows us to work strictly for the client's needs, using a wide variety of investment products available. Maintaining a diverse and objective product mix is the philosophy we employ to try and achieve the proper financial plan for our clients.

Listed below are our most widely used products.

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|-------------------------|------------------------------|-------------------------------|
| <i>Allianz</i> | <i>Jackson National Life</i> | <i>Pimco</i> |
| <i>American Equity</i> | <i>John Hancock Funds</i> | <i>Principal Life</i> |
| <i>American Funds</i> | <i>Lincoln Benefit Life</i> | <i>Putnam Investments</i> |
| <i>American General</i> | <i>Mass Mutual</i> | <i>Scudder Investments</i> |
| <i>Fidelity Advisor</i> | <i>New York Life</i> | <i>SunLife</i> |
| <i>Genworth</i> | <i>Oppenheimerfunds</i> | <i>Transamerica</i> |
| <i>Hartford Life</i> | <i>Pacific Life</i> | <i>Van Kampen Investments</i> |
| <i>ING</i> | <i>Penn Mutual Life</i> | |

Plan for your future today.



e FINANCIAL GROUP

David A. Evans, CPA/PFS
130 Industrial Blvd., Suite 100 • Sugar Land, TX 77478
Ph. 281-491-5100 • Fx. 281-491-5104
www.efinancialgroup.com • david.evans@jwcemail.com
Not a CPA Firm

Securities offered through:
J.W. Cole Financial Inc. (JWC)
Member: FINRA/SIPC
Advisory services offered through
J.W. Cole Financial Inc. (JWCA)

E Financial Group, Inc. and JWC/JWCA are separate and unaffiliated entities



We strive to help you to create, grow and protect your estate.



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