

FIVE STAR WEALTH MANAGER

Lance A. Browning

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- Comprehensive wealth management portfolio design
- Financial Planning
- Retirement income planning

For nearly 20 years, Lance has passionately believed that a successful outcome should be income. Income Solutions Wealth Management offers a high-level and lifelong relationship experience through communication, education and service. Develop income strategies for now and for later.

Securities offered through LPL Financial, member FINRA/SIPC.

The Outcome Should Be Income



Wealth Managers do not pay a fee to be considered or placed on the final list of Five Star Wealth Managers. Once awarded, wealth managers may opt to purchase additional profile ad space or related award promotional products (including this item). The award methodology does not evaluate the quality of services provided.

Award winner seen in
TEXAS MONTHLY

The Five Star Wealth Manager award, administered by Crescendo Business Services, LLC (dba Five Star Professional), is based on 10 objective criteria. Eligibility criteria – required: Credentials as a registered investment adviser or a registered investment adviser representative; 2. Active as a credential professional in the financial services industry for a minimum of 5 years; 3. Favorable regulatory and complaint history review (As defined by Five Star Professional, the wealth manager has not: A. Been subject to a regulatory action that resulted in a license being suspended or revoked, or payment of a fine; B. Had more than a total of three customer complaints files against them [settled or pending] with any regulatory authority of Five Star Professional's consumer complaint process. Unfavorable feedback may have been discovered through a check of complaints registered with a regulatory authority or complaints registered through Five Star Professional's consumer complaint process; feedback may not be representative of any one client's experience; c. Individually contributed to a financial settlement of a customer complaint filed with a regulatory authority; D. Filed for personal bankruptcy; E. Been convicted of a felony); 4. Fulfilled their firm review based on internal standards; 5. Accepting new clients. Evaluation criteria – considered: 6. One-year client retention rate; 7. Five-year client retention rate; 8. Non-institutional discretionary and/or non-discretionary client assets administered; 9. Number of client households served; 10. Education and professional designations. Wealth managers do not pay a fee to be considered or placed on the final list of Five Star Wealth Managers. Award does not evaluate quality of services provided to clients. Once awarded, wealth managers may purchase additional profile ad space or promotional products. The Five Star award is not indicative of the wealth manager's future performance. Wealth managers may or may not use discretion in their practice and therefore may not manage their client's assets. The inclusion of a wealth manager on the Five Star Wealth Manager list should not be construed as an endorsement of the wealth manager by Five Star Professional or this publication. Working with a Five Star Wealth Manager or any wealth manager is no guarantee as to future investment success, nor is there any guarantee that the selected wealth managers will be awarded this accomplishment by Five Star Professional in the future. For more information on the Five Star award and the research/selection methodology, go to fivestarprofessional.com 2,471 Dallas/Fort Worth wealth managers were considered for the award; 678 (28 percent of candidates) were named 2016 Five Star Wealth Managers.