

# Mark Nash

*Financial Advisor		
Menu of Services (Core)		
<b>Tax and Accounting</b>	<b>Business Consulting</b>	<b>Audit Support</b>
Individual, self-employed, and single member LLCs	501(3)c formations	Sarbanes-Oxley Compliance audits Internal audit and internal controls review projects
Electronic Filing	LLC formations	Information technology audits
Tax Planning and Consulting	Business Banking Services (referrals to Wells Fargo for banking products)	Financial audit support Internal, external, and operational audit support
QuickBooks and Bookkeeping Consulting Services	Computer Repair Consulting (antivirus, antispyware, hard drive recovery, etc.)	

<b>Planning Services</b>	<b>*Investments</b>	<b>Insurance</b>
Retirement Planning	Individual Retirement Accounts (IRAs)	Fixed and Variable Annuities*
-Rollovers*	Mutual Funds	Life insurance (whole, term, and universal)
-IRA's*	College 529 Plans	Disability Insurance
-SEP's*	Investments	Long Term Care Insurance
-Simples*		
-401ks*		
College Planning	<b>Estate Planning Services</b>	<b>Financial Services</b>
Tax Reduction Strategies	Wills	H.D. Vest Advisors
Cash Flow Analysis	Trusts	
Insurance Analysis	Powers of Attorney	<b>Health Insurance</b>
Personal Networth Analysis		Individual and group plans

<b>Property and Casualty Insurance</b>	<b>Loan Officer</b>
Homeowners including dwelling.	residential and commercial mortgages
Auto	new purchase
Flood	refinance
Texas Windstorm	residential and commercial electricity services
Individual and Commercial liability	
Commercial industries covered include apartments, beauty, barber, artisan, and general contractors.	

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Securities offered through H.D. Vest Investment Services<sup>SM</sup>, Member SIPC, Advisory services offered through H.D. Vest Advisory Services<sup>SM</sup>, Non-bank subsidiaries of Wells Fargo & Company, 6333 N. State Highway 161, 4th Floor, Irving, TX 75038, 972-870-6000.

**Please contact me at 713-858-9131 or mnash3@hotmail.com for questions or quotes.**

Note - List is subject to change. Please inquire about any carriers or markets not listed.

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Life, Health, and Financial Services (Core)		
<b>Life</b>	<b>*Annuity</b>	<b>*Mutual Fund Sponsors</b>
Illinois Mutual	Allianz Metlife of CT (Travelers)	Oppenheimer

<b>Health (Grp and Individual)</b>	<b>*Mutual Fund Sponsors IRA Custodians</b>	
BlueCross BlueShield of Texas Humana One	OppenheimerFunds	RPSS

<b>*Financial Services</b>
H.D. Vest Investment ServicesSM

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Property and Casualty Insurance Agent		
Personal (All carriers including high end private client) (Core)		
<b>Homeowners</b>	<b>Auto</b>	<b>Flood</b>
Fidelity National Texas All Risk	Select Gen. Agency (pending) Fidelity National	Fidelity National Flood
<b>Windstorm</b>	<b>Commercial</b>	<b>Umbrella</b>
Texas Windstorm Insurance Assoc.	Texas All Risk	Fidelity National

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