



**FINANCIAL PLANNING FOR YOUR LIFE'S MILESTONES**

Wallman Financial helps you plan for life events, such as getting married, buying a house, starting a family, or even a business. We help you to create a budget, build cash reserves, open or roll over a 401(k), and acquire insurance that helps to protect your assets and the ones you love. Most importantly, we help you plan for unexpected events, clearing the way for you to pursue your goals.

**DISCOVER HOW WALLMAN FINANCIAL CAN HELP YOU PURSUE YOUR FINANCIAL GOALS AND DREAMS.**

**Plan today for the financial independence you desire for tomorrow.**

Contact Michael Wallman for a complimentary and confidential financial planning consultation.



**Helping You Pursue Your Financial Goals**

**EXPERIENCE.  
TRUST.  
STRONG RELATIONSHIPS.**

**WALLMAN FINANCIAL**

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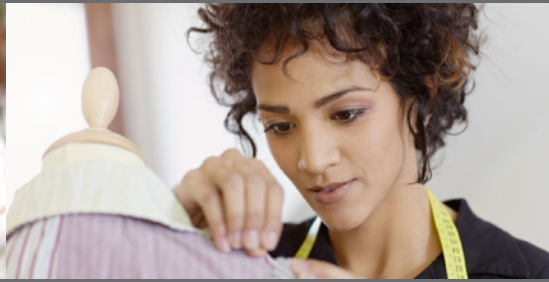
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**AT WALLMAN FINANCIAL, ONE OF OUR CORE PRINCIPLES IS FORGING STRONG RELATIONSHIPS WITH OUR CLIENTS. WE ACHIEVE THIS BY COMMUNICATING CLEARLY AND FREQUENTLY WITH YOU.**



**WALLMAN FINANCIAL**  
*Financial Planning Services*

# Helping You Improve Your Financial Future



## ABOUT WALLMAN FINANCIAL

The cornerstone of our practice is helping individuals, families, artists and small business owners accumulate savings for retirement through personalized financial planning strategies. We work with clients from the Orlando and Miami metropolitan areas and across the country to help them work towards achieving financial independence.

We are committed to helping you understand your financial situation and providing you with high-quality, detailed financial information. Our primary

objective is to help you pursue your financial goals by designing a comprehensive financial strategy that leads to a truly enjoyable retirement.

## HOLISTIC TEAM APPROACH

Wallman Financial utilizes a holistic team approach when designing your financial strategy, encompassing every facet of your financial life. When you need estate, tax or insurance advice, you can rely upon our long-standing relationships with other experienced professionals, resulting in a stronger and confident strategy to help your estate wishes be fulfilled.

Michael provides a high degree of client communication and concierge-level service. He has a keen insight for developing professional and personal relationships.

## DEDICATED TO SUPPORTING AND ADVANCING HIS COMMUNITY.

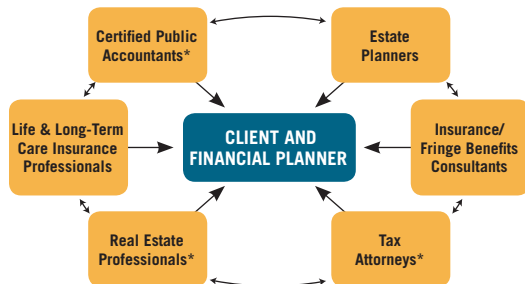
Michael served as a board member for the Miami and Orlando School Advisory Councils for more than 10 years. He is a cofounder of the Miami Lacrosse Association, past president of the Miami Spanish International Parent Association, and was a member of the City of Miami's Code Enforcement Board for two terms.

Michael is an advocate for the LGBT Community. He has sought equal rights support from local commissioners and politicians, and moderates Lunch and Learn workshops to address financial matters unique to LGBT families and same-sex couples. Michael enjoys spending time with his three daughters, watching college sporting events and working out.

## MICHAEL WALLMAN, FINANCIAL PLANNER, MANAGING DIRECTOR



Michael Wallman is an investment executive with more than 20 years experience in the financial services industry. He works closely with his clients in formulating investment strategies that match their unique goals and objectives.



*\*H. Beck, Inc. Financial Advisors do not offer legal, tax or real estate advice.*

**"I'M PASSIONATE ABOUT HELPING MY CLIENTS BUILD THEIR SAVINGS FOR RETIREMENT. I ALSO ENJOY MEETING WITH CLIENTS FACE-TO-FACE, AND I'M HIGHLY-RESPONSIVE TO CLIENT EMAILS AND CALLS."**  
MICHAEL WALLMAN, FINANCIAL PLANNER