Zachary H. Welborn, CFP®, CRPC®, CFS®

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Manske Wealth Management
Manske Wealth Management offers investment advice and financial planning with a primary focus on monthly client communication. The firm's accomplishments include:

- 2018 Recognized as the ninth largest Registered Investment Advisory firm in Houston by Financial Advisor Magazine
- 2009-2018 Named Five Star Wealth manager by Texas Monthly Magazine
- 2017 Selected as one of The Best Places to Work in 2017 by Houstonia Magazine
- 2014 Named "Most Client Focused Wealth Manager – Texas" by Wealth & Finance International Magazine

Senior Financial Advisor
He leads the Institutional Investments team at Manske Wealth Management where he offers individual portfolio design for institutions and individuals. Creates clear path for clients to reach their financial goals by diligently working to minimize taxes, increase net worth over time, and provide a secure retirement.
His accomplishments include:

- Currently in good standing with the board as a CERTIFIED FINANCIAL PLANNER™
- Serves as a CFP Board Mentor offering advice and support to aspiring CFP® professionals
- Keynote Speaker at many events to include:
    - First Colony networking group attended by 30+ business professionals
    - Business Networking International breakfast event with 35+ professionals in attendance
    - Sugar Creek Country Club breakfast event attended by 50+ local business owners
- Featured in Forbes in August 2018 – "The Retirement Planning Challenges In Age-Gap Relationships"
- Published in Reader's Digest in July 2018 – "Retirement Mistakes That Will Ruin Your Retirement"
- Received Five Star Wealth Manager award in April 2018
- Awarded 2018 Business Networking International Member of Excellence
- Published in Blerrp in March 2018 – "20 Networking Tips to Help You Make Valuable Business Connections"
- Highlighted by Houstonia Magazine in December 2017
- Featured in Advisor News in September 2017 – "Should Advisors Bite on Bitcoin?"
- Quoted in Reader's Digest in July 2017 – "15 Money Management Tips Every Recent Grad Should Memorize"
- Published in U.S. News & World Report in November 2016 – "5 Ways to Cut 401(k) Fees Down to Size"
- Completed Rice University's CFP® Certification Education Program
- Earned Chartered Retirement Planning Counselor (CRPC®) designation via College for Financial Planning
- Achieved Certified Funds Specialist (CFS®) designation via Institute of Business & Finance

Organizations

- President – Business Network International (current)
- Membership Committee - Business Network International (past)
- Club Representative - Toastmasters International (past)
- Founding Member - Employer Advantage Alliance (past)

Personal & Odd Facts

- He loves traveling, cooking, hunting and fishing
- Someday he hopes to compete in the World Competition BBQ Circuit
- Founding member of The Red Drum Bums saltwater fishing tournament team
- Helped raise money for wounded veterans through TX Coastal Fishers of Men's Annual Fish & Fellowship Tournament
- Ask him about his most recent elk hunt in Colorado where he packed 25 miles into the Weminuche Wilderness on "muleback" and camped on the Continental Divide
- Has won several 1st and 2nd place belt buckles competing in the Houston Livestock Show and Rodeo

Education
Rice University, Susanne M. Glasscock School of Continuing Studies
CERTIFIED FINANCIAL PLANNER™ Certification Education Program

University of Houston, C.T. Bauer College of Business
Bachelor of Business Administration, Finance & Financial Services

Favorite Quote

"The harder you work, the luckier you get" – Gary Player