



*Texas City Management
Association (TCMA)*

Financial Planning Service

*In conjunction with Total
Compensation Group
Advisors, LP (TCG)*





Financial Planning

The Texas City Management Association (TCMA), working with TCG Advisors, LP (TCG) is pleased to present a new program for TCMA members. This partnership offers a series of financial planning and employment agreement services that members can choose to implement as their individual circumstances warrant. TCG is located in Austin, Texas and has extensive experience, assisting public officials with developing, fine tuning and maintaining their financial plans, including compensation packages. TCG is a fee-only financial and investment advisory firm.

In 2004, the TCMA Board created a Task Force to research the possibility of providing a set of financial planning services to its membership. The members of the Task Force met with TCG several times to determine how TCG could help TCMA members with financial planning, investment advice, employment agreement structure and negotiation, and legal advice through the law firm of Adams, Lynch and Loftin, P.C. At their April 1, 2005 meeting, the TCMA Board approved a pilot program to enter into a one-year agreement with TCG to offer a series of financial planning and employment agreement services to TCMA members.

Investment Planning

GOALS OF OUR SERVICE:

- *This service is NOT about positioning TCMA members to gouge their cities*
- *It IS about FAIRNESS*
- *It is NOT about preferential treatment for City Managers*
- *It IS about recognizing the UNIQUENESS of the City Manager position*
- *In the end, this is about "receiving stability and security in recognition for the integrity and professionalism members bring to their positions"*

TCMA is the initial point of contact between the individual TCMA member and TCG. Once a TCMA member decides to use any of the services offered through this program, TCG works directly with and for the individual member and strict confidentiality is maintained between the individual and TCG. Legal advice will be provided by the law firm of Adams, Lynch & Loftin, P.C. located in Bedford, Texas.

Retirement Planning



TCMA Financial Planning Service Options

- **Individual Members** – If you are a TCMA member and interested in receiving help with financial planning, an employment agreement, or legal issues specifically regarding your employment agreement, you can receive assistance through TCMA's pilot program at a substantial discount. Please complete the form provided and e-mail or fax it as instructed.
- **Regional Presidents and Other TCMA Members Seeking Speakers** – If you are interested in having a speaker at a TCMA Region Meeting on the topics of financial planning or employment agreements, please e-mail or fax this form as instructed.

Who to Contact:

Financial Planning and Other Financial Planning-Related Issues

Mike Cochran (tcma@tcginvestments.com)

Tel: (512) 306-9939 or Fax to (512) 306-9959

4201 Bee Caves Road, Suite C-101, Austin, TX 78746

Employment Agreement-Related Legal Issues

Neal Adams (nwa@all-lawfirm.com)

Tel: (817) 283-7742 or Fax to (817) 571-2947

1903 Central Drive, Suite 400, Bedford, TX 76021

Copies: Please e-mail or fax a copy of all requests to Gary Watkins at TCMA (gwatkins@tml.org) or (512) 231-7495 and Mike Cochran (information above).

TCMA Financial Planning Service

Member Interest Form

Please contact me regarding the following services:

Financial Planning Services:

- I am interested in information/discussion for full financial plan.
- I am interested in information/discussion for retirement (only) plan.
- I am interested in information/discussion for investment (only) plan.

Employment Agreement Services:

- I am interested in a review and recommendations on my current employment agreement.
- I am interested in discussing an employment agreement, as I don't have one.
- I am interested in discussing negotiation services on my employment agreement.

My TCMA member contact information is:

Date: _____

Name: _____

E-mail Address: _____

Work Phone: _____

Home Phone: _____

Cell Phone: _____

Work Address: _____

Home Address: _____

Please send to TCG by fax at (512) 306-9959 or email at tcma@tcginvestments.com

I am interested in an educational program at my TCMA Region _____ meeting.



HOW WOULD YOU ANSWER THESE QUESTIONS?

- Do you have a financial plan?
- What are the gaps in your financial plan?
- In what ways are you and your family "at risk" financially?
- When was the last time you reviewed your financial plan?
- Have your career goals changed?
- Has your family situation changed?
- Has your financial plan stayed abreast of these changes?
- Do you have an employment agreement?
- If not, is it time for you to consider one?
- Can your current employment agreement be improved?
- If you were fired Monday, how vulnerable financially would your family be?



TEXAS CITY MANAGEMENT ASSOCIATION