



## Phyllis Martin, CPA\* Financial Advisor

**MassMutual Greater Houston  
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Houston, TX 77046  
713-402-3850**

Phyllis Martin is a Financial Advisor with MassMutual Greater Houston, a general agency of Massachusetts Mutual Life Insurance Company (MassMutual). Phyllis is now working with Transtar members to help you achieve your financial goals through products and services not previously available through credit union referral\*.

Phyllis's normal hours in our offices are every Friday from 9 a.m. to 4:00 at the Williams Tower Branch on Level 20, and on Wednesdays from 1 to 4 p.m. at the 290 Main Office. Outside of those hours, Phyllis is available by appointment by calling her directly at 713-402-3850.

Phyllis has been recognized as a MassMutual "Leader" in 2005, 2006 and 2014 and a "Rising Leader" in 2007. She received the honor of "Rising Star" from the Houston Association of Insurance and Financial Advisors in 2005. She has been named four times (2015-2018) a 5-Star Wealth Manager by Texas Monthly.\* Phyllis was one of only eight financial professionals selected by Forbes to feature in their special issue "Forbes 2016 Investment Guide", also known as the Forbes Wealth Managers Black Book. Phyllis is also a Certified Public Accountant\*\* and is a past Chairperson of a Financial Committee and a former member of the Diversity Committee for the Houston Chapter of CPAs. She has also served on the boards of both the Houston and Texas Society of CPAs. She is a member and prior board member of the Houston affiliate of the American Woman's Society of Certified Public Accountants and a member of the American Society of Women Accountants. Phyllis was honored as a "Woman of Excellence" by the Federation of Houston Professional Women in 2007.

Taking care of your financial needs is more than picking investments. It's about liquidity, risk management, retirement plans, estate analysis, tax minimization strategies, and more. Picking the right investments can help you achieve your goals - and your dreams. You can choose to work alone. Working with someone who knows the industry, who can offer tax reduction strategies, and who has access to other professional resources can be a real advantage in the pursuit of your goals. Transtar FCU provides its members access to comprehensive financial services in the Houston area through the financial professionals of MassMutual Greater Houston. Phyllis can help you with:

- Investment Strategies
- Tax Reduction Strategies
- Retirement Strategies
- Traditional and ROTH IRAs
- Disability Income Insurance
- Long Term Care Insurance
- 401(k) / Pension Rollovers
- Estate Analysis
- Mutual Funds
- Education Savings Plans
- Life Insurance
- Annuity Products
- Trust Services\*\*\*

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**Products and services offered are not a Credit Union deposit or obligation. Not guaranteed by any Credit Union. Not NCUA-insured. Not insured by any government agency. May go down in value.**

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