



At a Glance

About

- At a Glance
- Our Story
- Board of Directors
- Careers

Click below to view in a new window (PDF)

Our Clients

OVER 30
families served from
different generations
of wealth

58%
1st Gen

31%
2nd Gen

11%
3rd Gen

1/2
of our clients are based
outside of Texas

OUR CLIENTS COME FROM MANY INDUSTRIES:
 Retail • Technology • Real Estate • Energy • Professional Services
 Financial Services • Manufacturing

Our Team

40
total employees

24
post-graduate degrees

32
professional certifications

95%
Average annual officer retention

30%
Employee shareholders

Our Numbers

\$45
MILLION
median managed assets per client

\$5.5
BILLION
assets under management

Data is as of 10/31/22