

Our Clients

OVER **30**

families served from
different generations
of wealth



1st Gen



2nd Gen



3rd Gen



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



total employees



post-graduate degrees



professional certifications



Average annual officer retention



Employee shareholders



Our Numbers



median managed assets per client



assets under management