

Our Clients

OVER **40**

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



median employee annual turnover



employee shareholders



Our Numbers



\$50

MILLION

median managed assets per client

\$6.5

BILLION

assets under management

