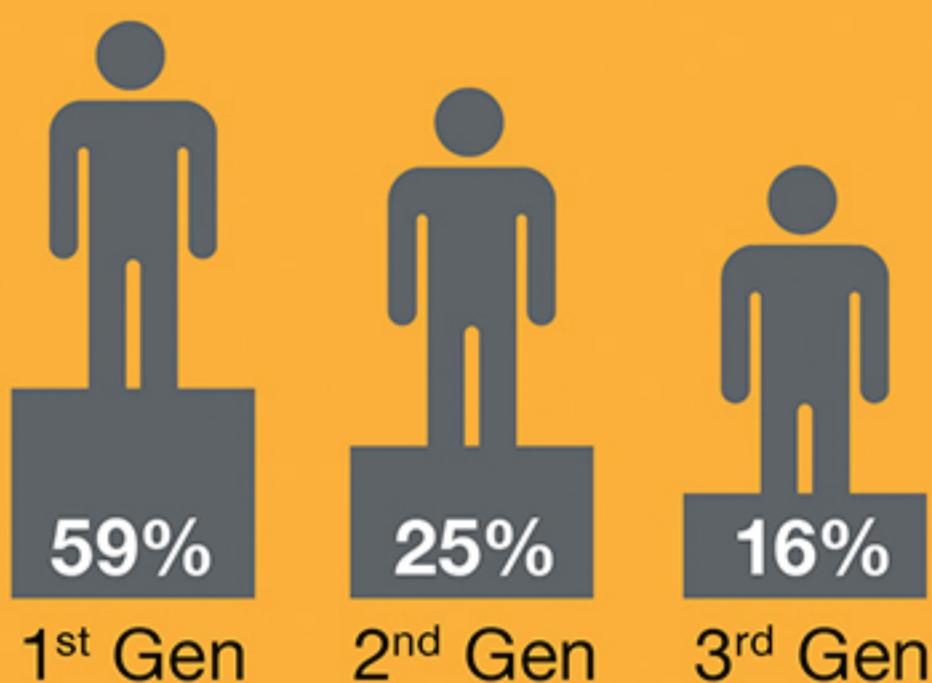


Our Clients

OVER **40**

families served from
different generations
of wealth



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

19 
post-graduate degrees

31 
professional certifications

 **2%**
median employee annual turnover
over the past decade

30%
employee shareholders



Our Numbers

 **\$50**
MILLION
median managed assets per client

\$7
BILLION
assets under management