



# AT A GLANCE

## FIRM STATISTICS

**\$605 Million+ Client Assets**

*As of 12/31/23.*

**93% Retention Rate (2020-2023)**

## OUR ACHIEVEMENTS:\*

**#3 Best Places to Work** in San Antonio in the Very Small Employer Category, 2023<sup>2</sup>

**#2 Largest Money Management Firm in San Antonio** ranked by number of local clients, 2023<sup>1</sup>

**#2 Largest Financial Planning Firm in San Antonio** ranked by number of financial professionals, 2023<sup>1</sup>

**#10 Largest Money Management Firm in San Antonio** ranked by assets under administration, 2023<sup>1</sup>

\*All awarded through San Antonio Business Journal

## LEADERSHIP



**ELIZABETH A. VALENTI, CLTC, AIF®**

Sr. Vice President

(210) 998-5036 | evalenti@pws-texas.com

## OUR CULTURE:

Family environment  
Professional  
Caring  
Supportive  
Camaraderie  
Honest  
Fun

Putting our clients first  
Motivating  
Committed  
Team  
Respect  
Follow through  
Joint work & mentorship



## PROFESSIONAL DESIGNATIONS

*Held by Our Advisors*

CFP®

CLU®

CLTC

ChFC®

MBA

AIF®

LUTCF®

## WHERE WE'RE GOING...

By the end of 2024, we will win with a team of:

- ♦ 22 Financial Advisors who are all fiduciaries
- ♦ 2 Directors
- ♦ Producing \$4.5 Million Total GDC
- ♦ \$700 Million Assets Under Management

## HOW WE'RE GETTING THERE...

By making an unforgettable positive impact in the lives of our clients and associates so that they say they can't imagine what their life would be like without their advisor and Platinum Wealth, if we hadn't opened our doors in 2010.

### For Financial Professional Use Only.

WE ARE STRONGLY COMMITTED TO DIVERSITY AND EQUAL OPPORTUNITY.

<sup>1</sup>The 2023 Largest San Antonio Financial Planning Firms list is compiled by the San Antonio Business Journal in San Antonio, Texas. Ranking is based on information provided by the financial professional. This includes total number of local staff, types of investments, and assets under management locally among other factors. Third-party rankings and recognitions are no guarantee of future investment success and do not ensure that a client or prospective client will experience a higher level of performance or results. These ratings should not be construed as an endorsement of the advisor by any client nor are they representative of any one client's evaluation.

<sup>2</sup>The 2023 Best Places to Work in San Antonio is issued by the San Antonio Business Journal. Nominees may have applied for the award and winners are chosen through an online survey that measures employee engagement. Third-party rankings and recognitions are no guarantee of future investment success and do not ensure that a client or prospective client will experience a higher level of performance or results. These ratings should not be construed as an endorsement of the advisor by any client nor are they representative of any one client's evaluation.

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