



AT A GLANCE

FIRM STATISTICS

\$789.2+ Million Client Assets (12/31/25) | 80% Retention Rate (2022-2025)

OUR CULTURE

Family Environment	Caring
Clients First	Honest
Joint Work/Mentorship	Fun
Follow Through	Motivating
Professional	Committed
Supportive	Team
Camaraderie	Respect

OUR ACHIEVEMENTS

#2 Best Places to Work in San Antonio

Very Small Employer Category, 2025¹

#12 Largest Financial Planning Firm in San Antonio

By Assets Under Management, 2025¹

#13 Largest Money Management Firm in San Antonio

By Amount of Locally Managed Assets, 2025²



**All awarded through San Antonio Business Journal*

LEADERSHIP



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DESIGNATIONS

Certified Financial Planner™ - CFP®

Certified Long-Term Care - CLTC

Masters of Business Administration - MBA

Life Underwriting Training Council Fellow - LUTCF®

Chartered Life Underwriter® - CLU®

Chartered Financial Consultant - ChFC®

Accredited Investment Fiduciary - AIF®

WHERE WE'RE GOING...

We strive every day to make an unforgettable positive impact in the lives of our clients and associates so they say they cannot imagine what their life would be like without the Platinum Wealth Solutions of Texas team, if we had not opened our doors in 2010.

For Financial Professional Use Only.

WE ARE STRONGLY COMMITTED TO DIVERSITY AND EQUAL OPPORTUNITY.

1) The 2025 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.

2) The 2025 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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