

OUR 3 YEAR VISION BY 12/31/2025:

#1 San Antonio Business Journal Best Places to Work in San Antonio Top 3 San Antonio Business Journal Financial Planning Firm First Class Client Experience unlike anywhere else

TO ACHIEVE OUR VISION, WE WILL GROW OUR TEAM WITH INDIVIDUALS THAT ARE:

Coachable Competitive Confident Connectors Driven Enthusiastic Entrepreneurial Extroverted Good Communicators Growth Oriented Honest Influencers Likable Motivated Optimistic Organized Passionate about helping others Positive Process Oriented Successful Team Players Trustworthy

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