



## **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:**

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