

## Our Clients

OVER **40**

families served from different generations of wealth



1<sup>st</sup> Gen



2<sup>nd</sup> Gen



3<sup>rd</sup> Gen



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

**21** 

post-graduate degrees

**33** 

professional certifications

 **4%**

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