



OUR 3 YEAR VISION BY 12/31/2022:

*Top 5 San Antonio Business Journal Financial Planning Firms by AUM
Top 3 San Antonio Business Journal Best Places to Work in San Antonio
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>