

# IMPACT & SCALE

## 2020 REFLECTIONS



### Our Mission:

Empower people to live intentionally.

### Live Your Intentions:

- Retire sooner.
- Travel the world.
- Start a business.
- Give more.
- College for kids.
- Change careers.
- Volunteer.
- Disney with grandkids.
- Time for others ... Time for yourself!

As we lived out our mission in 2020, the following milestones came into focus ...



### 1/2 Billion

Provided advice on over \$500,000,000 of **TOTAL CLIENT ASSETS** entrusted to our firm.



### 600+

Engaged in 600+ **FINANCIAL PARTNERSHIPS** (managed accounts and financial plans)—30% growth in the number of people that are more intentional, purposeful, and generous with their money.



### \$1M

Facilitated over \$1,000,000 in **CHARITABLE GIFTS FROM CLIENTS TO LOCAL CHURCHES AND CHARITIES**: \$1,000,000 of asset-based gifts (stocks, funds, QCD's) to churches, charities and donor-advised funds.



### \$300M

Nearly \$300 Million in **MANAGED ACCOUNT ASSETS**.



### 15/\$100K

Aligned with nearly **15 LOCAL NON-PROFITS** and invested over \$100,000 into **ORGANIZATIONS, RELATIONSHIPS AND PROGRAMS** that are meaningful to our clients and community.



### 100s

**ASSISTED HUNDREDS OF CLIENTS** with once-in-a-lifetime financial events like retirement, college education, purchasing second homes, bucket list experiences, and estate/charitable giving plans.

All values shown are as of December 31, 2020.

*Plan intentionally—Live generously*

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