



# WEALTH ADVISORS

AN INDEPENDENT WEALTH MANAGEMENT FIRM



CLIENT-FOCUSED. UNBIASED ADVICE.

**OUR MISSION** is to deliver unbiased advice while building client loyalty through extraordinary personal service. We give you confidence for life.

Our team can guide every aspect of your financial life. Contact us to discover why fee-only wealth management is important.

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CONFIDENCE *for* LIFE™

# BEST 2018

## How We Did It:

**Financial Planners:** *D Magazine* asked every Certified Financial Planner in the Dallas-Fort Worth chapter of the Financial Planning Association to cast an online ballot. They were asked to name peers, both inside and outside their firms, whom they considered to be the most skilled and experienced financial planners in the industry. Outside-firm votes counted more than inside-firm votes. Self-nominations were tossed out. A panel of esteemed local financial planners reviewed the list. Only CFPs made the list. 750 votes were cast, and a total of 235 individuals were nominated. Of these, 91 were selected.

**Wealth Managers:** We asked every wealth management firm and team in the Dallas-Fort Worth chapter of the Financial Planning Association, Chartered Financial Analyst Institute, and the Investments and Wealth Institute to tell us about their practices. The final list was selected based on these criteria: top firms or teams must have total assets under management for individual clients of at least \$100 million; average assets under management per client of at least \$1 million; a 95 percent client retention rate over the last two years; and no current disciplinary action. Additionally, all firms (or teams, should the team be applying as an entity separate from its parent company) must have been in existence for at least five years as of the application deadline (June 13, 2018). They must also hold themselves out as fiduciaries for their clients and provide them with a written disclosure. A panel of esteemed local wealth managers reviewed the final list. All numbers are current as of the application deadline. Out of the 44 that applied, 24 firms and teams were selected.