



WEALTH ADVISORS

AN INDEPENDENT WEALTH MANAGEMENT FIRM

CONFIDENCE FOR LIFE™

# OUR TEAM CAN GUIDE EVERY ASPECT OF YOUR FINANCIAL LIFE.



Row 1: Hannah Szarszewski, Crystal Billing, Shashin Shah, Taylor Nipp, Kevin Margolis, David White, Ryan Blair, Stephanie Poorman, Maggie Johnston.  
Row 2: Jennifer Kislig, Linda Braund, Barry Evans, Greg Morgan, Craig Greenway, David Gamble, Brittany Castaldi, Melissa Hawkins, Row 3: Nick Gaumer, Tim Flannery, Garrett Cayet

## CLIENT-FOCUSED. UNBIASED ADVICE.



CONTACT US TO FIND OUT WHY FEE-ONLY WEALTH MANAGEMENT IS IMPORTANT

7800 Dallas Parkway, Suite 350 | Plano, TX 75024  
972-960-6460 | [SFMG.com](http://SFMG.com) | [info@SFMG.com](mailto:info@SFMG.com)

Fee  Only®



**Best Financial Planners:** D Magazine asked every CERTIFIED FINANCIAL PLANNER™ professional in the Dallas-Fort Worth Chapter of Financial Planning Association® to cast an online ballot. 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 CFP®'s made the list.

**Top Wealth Managers:** We asked every wealth management firm and team in Dallas-Fort Worth Chapter of Financial Planning Association®, Chartered Financial Analyst Association®, and the Investment Consultants Association® to tell us about their practice. 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 \$50 million; average assets under management per client of at least \$75,000; a 93 percent client retention rate over the last two years; no current disciplinary action; and at least five years of experience. A panel of esteemed local wealth managers reviewed the final list.