



AT A GLANCE

FIRM STATISTICS

\$450 Million+ Client Assets

*As of 1/31/21. *****

79% Retention Rate (2017-2020)

OUR ACHIEVEMENTS:*

#3 Largest San Antonio Financial Planning Firm
ranked by number of financial professionals, 2020 **

#11 Largest San Antonio Financial Planning Firm
ranked by assets under administration, 2020 **

**#5 Best Places to Work in San Antonio in the Small
Employer Category, 2020 *****

**All awarded through San Antonio Business Journal*

LEADERSHIP



ELIZABETH A. VALENTI, CLTC, AIF®

Sr. Vice President

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OUR CULTURE:

Family environment	Putting our clients first
Professional	Motivating
Caring	Committed
Supportive	Team
Camaraderie	Respect
Honest	Follow through
Fun	Joint work & mentorship



PROFESSIONAL DESIGNATIONS

Held by Our Advisors

CFP® CLU®

CLTC ChFC®

MBA AIF®

LUTCF®

WHERE WE'RE GOING...

By the end of 2023, we will win with a team of:

- ◆ 21 Financial Advisors who are all fiduciaries
- ◆ 2 Directors
- ◆ Producing \$4.5 Million Total GDC
- ◆ \$645 Million Assets Under Management

HOW WE'RE GETTING THERE...

By making an unforgettable positive impact in the lives of our clients and associates so that they say they can't imagine what their life would be like without their advisor and Platinum Wealth, if we hadn't opened our doors in 2010.

WE ARE STRONGLY COMMITTED TO DIVERSITY AND EQUAL OPPORTUNITY.

**The 2020 Largest San Antonio Financial Planning Firms list is compiled by the San Antonio Business Journal in San Antonio, Texas. Ranking is based on information provided by the financial professional. This includes total number of local staff, types of investments, and assets under management locally among other factors. Third-party rankings and recognitions are no guarantee of future investment success and do not ensure that a client or prospective client will experience a higher level of performance or results. These ratings should not be construed as an endorsement of the advisor by any client nor are they representative of any one client's evaluation.

***The 2020 Best Places to Work in San Antonio is issued by the San Antonio Business Journal. Nominees may have applied for the award and winners are chosen through an online survey that measures employee engagement. Third-party rankings and recognitions are no guarantee of future investment success and do not ensure that a client or prospective client will experience a higher level of performance or results. These ratings should not be construed as an endorsement of the advisor by any client nor are they representative of any one client's evaluation.

****Source: Advisor Business Intelligence, Royal Alliance Associates, Inc.

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