



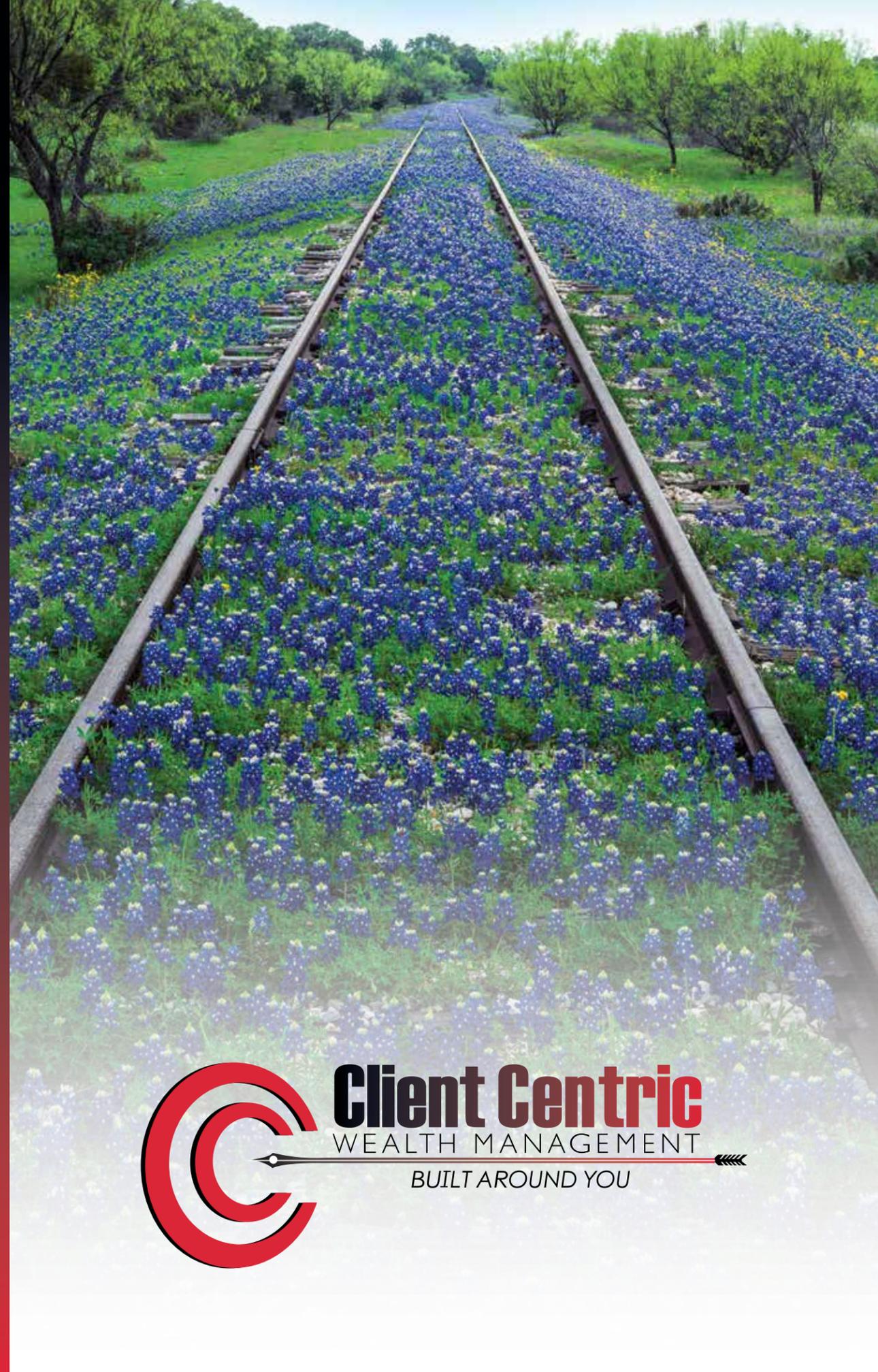
Call one of our advisors today to see how we can become your partner for success.



www.ccmgmt.com
 Phone: (210) 807-7599
 Fax: (210) 855-9970
 19230 Stone Oak Parkway, Suite 315
 San Antonio, TX 78258

About Us

We are excited to have the privilege of working together with fellow credentialed, high integrity, professional colleagues. Working together as a team, we draw on our similar investment process and philosophy, and have the technical tools to enable us to collaborate, even when one of our team members is not immediately available. We are confident that we will be able to continue to deliver personalized follow-through to help our clients and their families realize their financial aspirations and life goals.



“We believe that the best way to make money is to avoid losing it in the first place.”



About Client Centric Wealth Management

Here at Client Centric, we only focus on one thing: to be “client-centric”. We focus on the needs of our clients. We pour every ounce of effort into developing, implementing, and monitoring investment strategies with active risk management, all to help our clients meet their financial and lifestyle goals.

We believe in thinking “outside the box” and we are not afraid to challenge conventional wisdom in our approach to investing and managing wealth.

Why Choose Client Centric Wealth Management?

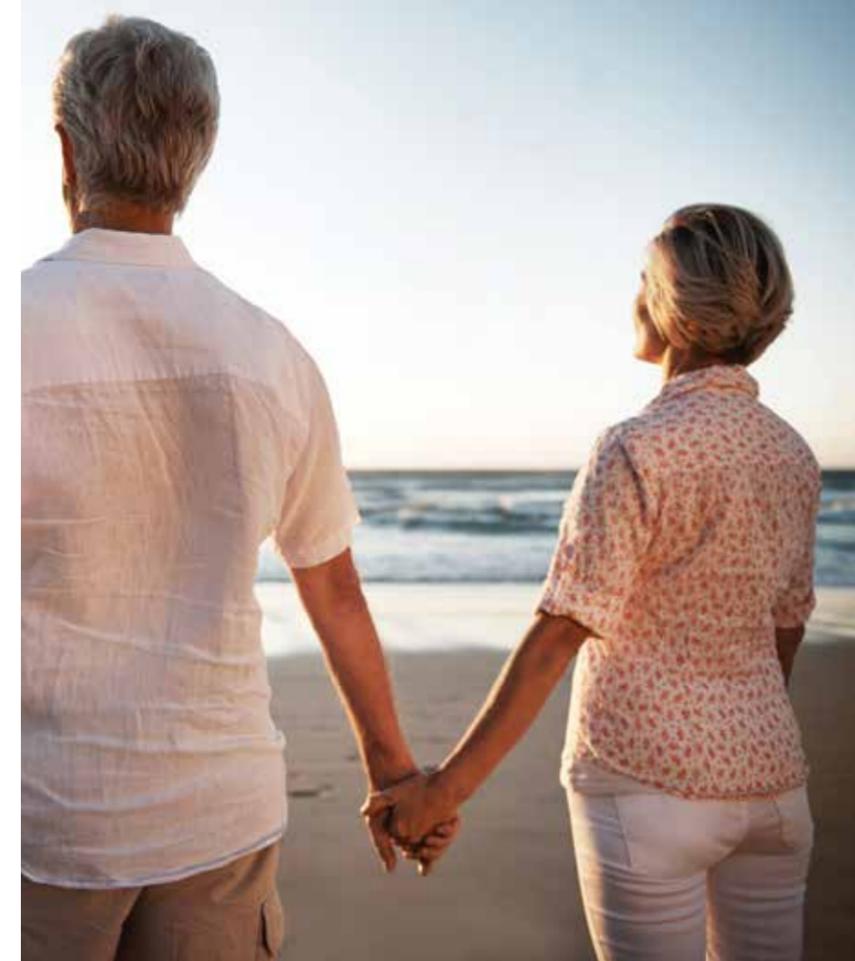
Whether or not to establish a relationship with a wealth advisor is a decision that deserves careful consideration. Here are some of the reasons why you can feel confident choosing Client Centric:

Independence & Objectivity

As an independent firm, we do not offer any proprietary products. Our independence is vital to delivering objective, unbiased recommendations. While some companies recommend investment products that are manufactured by parent or subsidiary business entities, we have no such ties.

Cutting Edge Technology

We invest heavily in technology to give our professionals high quality tools and to ensure a seamless experience for our clients. Our clients love having access to all of their accounts in one place.



Dedicated to Your Success

Valuable Experience

When you choose Client Centric, you benefit from obtaining credentialed comprehensive advice from a team of highly qualified professionals who have successfully managed money through some of the most difficult times in history.

Disciplined Asset Management

We are active risk managers who build diversified portfolios to help clients fulfill their long-term financial goals. Our seasoned investment managers follow sophisticated and disciplined strategies to help you build your wealth while carefully managing risks in all market environments. Our experience shows that better results may be achieved when active risk management is integrated into the wealth management process.

Diverse Offerings

Our combination of licenses, registrations, and special education qualify us to work with all types of investments. We have the ability to utilize various types of investment vehicles – simple or complex. Our process takes a comprehensive approach to planning that incorporates your insurance, legal and accounting needs in addition to your investments. We offer our clients a variety of valuable services including:

- Comprehensive Financial Lifestyle Planning
- Legacy, Estate, and Philanthropy Planning
- Tax Management Strategies
- Risk Management and Insurance Protection
- Enhanced Portfolio Reporting
- Frequent Communication and Education
- Social Security Optimization
- Alternative Investments (out of the stock markets)

