

A photograph of a man and a young child in a field of tall grass at sunset. The man, on the left, is wearing a dark blue button-down shirt and blue jeans. He is holding the hand of a young child on the right. The child is wearing a red, blue, and white plaid shirt and is looking up at the man. The background is a bright sunset over a field of tall grass.

# Promises Made ... Promises Kept

*Providing the bond to hold the family together for multiple generations*

# Promises Kept

*Alone we can do so little; together  
we can do so much*

Helen Keller



# Starting With People

Planning starts with people, not things. It starts with who you are, who your families are and who you might become.

The process must be heart-centered with exceptional people surrounding you to successfully implement your plan. It starts by listening and learning to see the world through your eyes – it's a collaborative experience, based on the objectives you have for your business, family and the causes you believe in. We'll

listen and learn what's important, then orchestrate an approach that fits your unique story – now and for generations to come.

This journey is one taken together. The people involved include your team and ours. We strive to incorporate individuals important in your life, people you want by your side. Like geese, different individuals will take the lead at different times, yet - we all are working toward common goals as you guide us.



# Promises Kept

*Keep every promise you make and only  
make promises you can keep.*

Anthony Hitt



# Collaboration and Coordination

When it comes to your personal and business life, there's too much information, too much complication for any one person to master it all – no one person can. You know this because you have sought help from trusted advisors instead of going it alone.

The best advisors understand this as well. They know they can't be experts of everything, so they seek the assistance of trusted colleagues outside their areas of expertise.

They have the courage to ask hard questions and know when to bring in the “right thinkers” for collaboration.

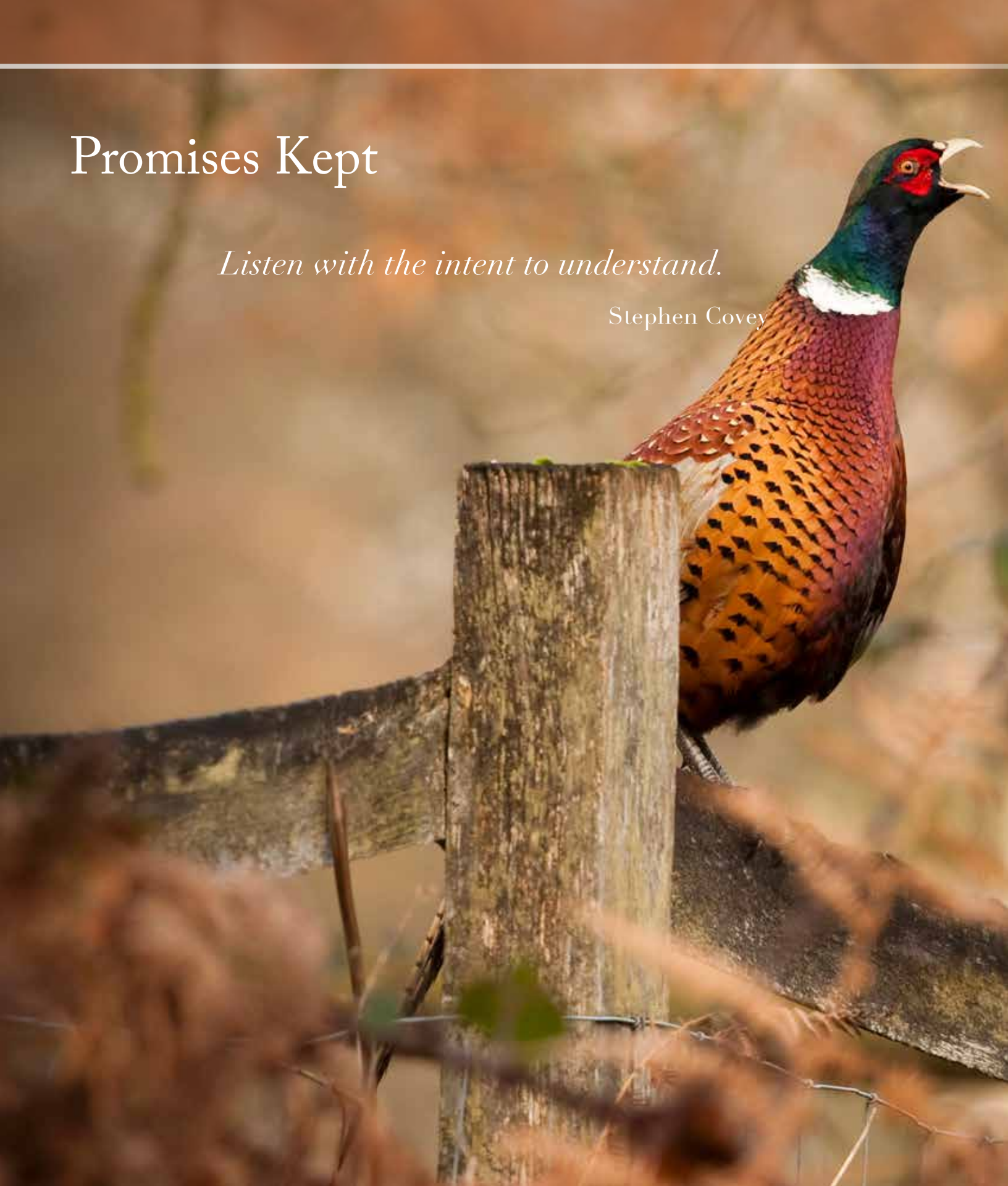
Here's where you lead us and we all come together: We're not working separately in our own silos – we work as one team, sitting down at the same table and looking each other in the eye. Because you're the reason for our work, you and the people you want in your inner circle are the center of attention when creating your plans.



# Promises Kept

*Listen with the intent to understand.*

Stephen Covey



# Your Unique Story

Time together is time well spent because it takes time to learn about you and understand your why.

We want to earn your trust and build a relationship – a friendship that will enhance all our lives for the better and support your goals in a synchronized and properly implemented manner. People might call us colleagues, coworkers or teammates, but we call each other

friends. Over time, we strive to earn and build relationships that extend far beyond emails, conference calls and meetings.

Together, we all share a purpose to add to the solid foundation you've built during your lifetime. With everything in place, you'll be able to sustain and protect what means the most to you.



# Promises Kept

*Shoot straight – Great advice for  
whatever you're doing*

Cowboy wisdom





# Why?

At the table, we listen carefully to your and everyone's ideas. No egos or hidden agendas. Everyone shares the same information. Everyone works for your greater good. By working and communicating together, looking each other in the eye, ideas are created, and we implement solutions you believe in to support the goals you have told us are important.

*It's all about building trust and respect, communicating and following through.*

It's about taking the possibilities and turning them into probabilities.

**Promises Made ... Promises Kept.**

The thoughtful wheels of all our hearts and minds are already in motion.



# Promises Kept

*Kindness is the language which the deaf can hear and the blind can see.*

Mark Twain



# Extraordinary Team

The team working for you isn't in the same office, or even the same state. We come from different backgrounds, and even different companies. Different logos, licenses or specialties ... yet we're all similar because we share the same values.

We build our reputations; one relationship at a time. **Promises Made ... Promises Kept** is the foundation of everything we do.

We believe we live in "rare air" in the advisory world – all of us working together, surrounding you with talented, passionate and caring people who are focused on helping you in any way we possibly can.

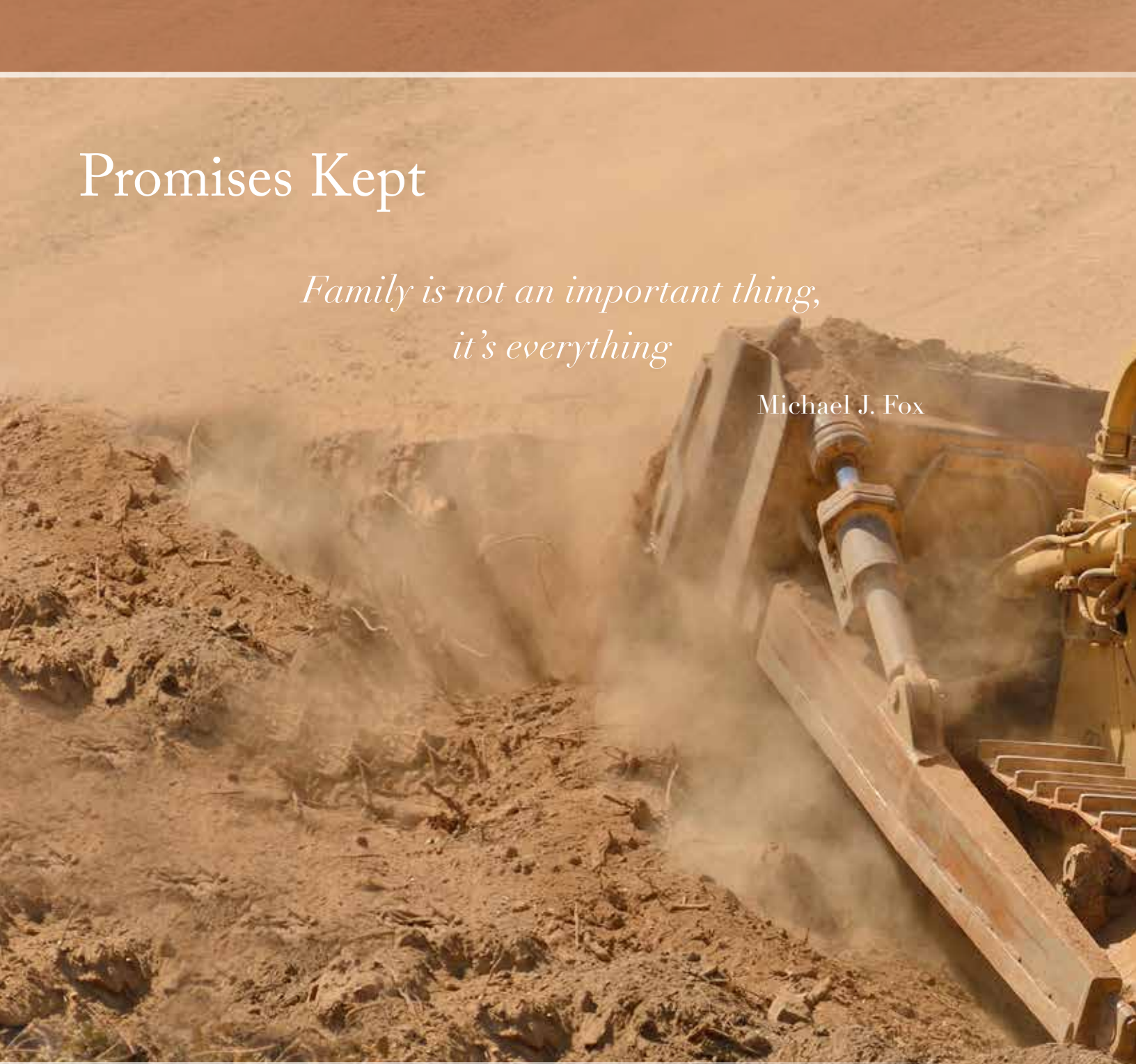
Our goal: listening and doing what's right for you ... always.



# Promises Kept

*Family is not an important thing,  
it's everything*

Michael J. Fox



# Finishing With People

In the end, it's all about people; ensuring the people who matter to you are being taken care of, and having trusted, talented people supporting you. People who are committed to being sure your mind and heart are at peace with your personal and business life going forward.



# Promises Kept

*Worry is like a rockin' horse. It's something  
to do that don't get you nowhere.*

Old West Proverb

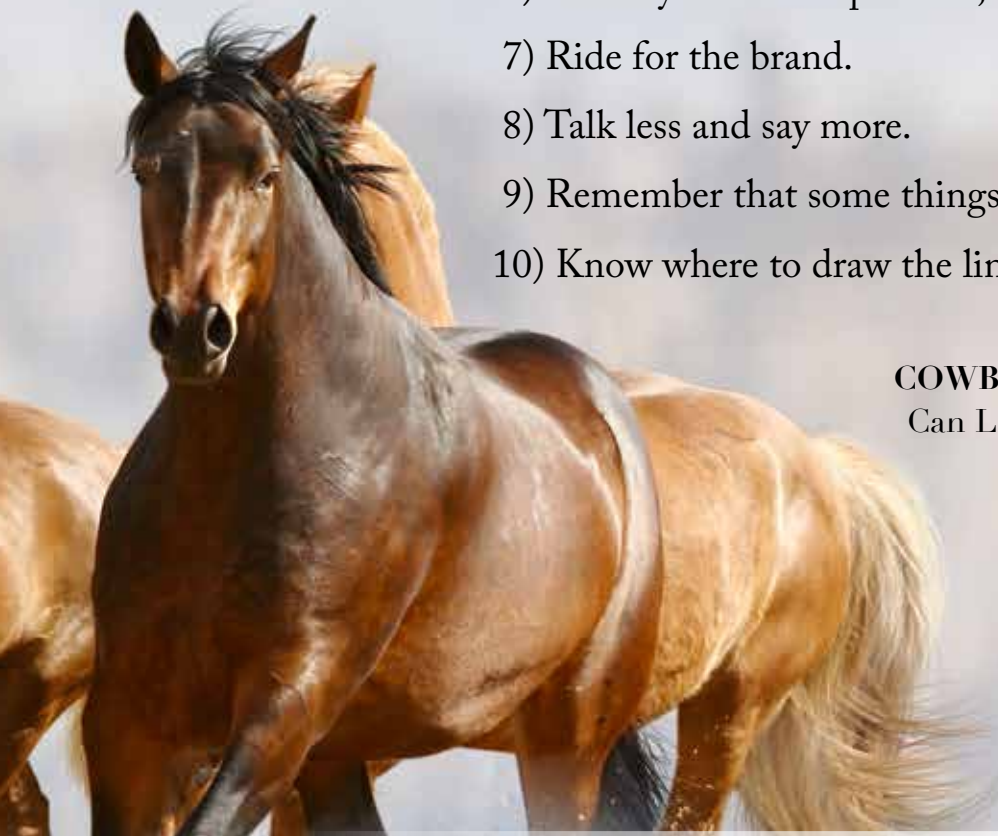


# Code of the West

- 1) Live each day with courage.
- 2) Take pride in your work.
- 3) Always finish what you start.
- 4) Do what has to be done.
- 5) Be tough, but fair.
- 6) When you make a promise, keep it.
- 7) Ride for the brand.
- 8) Talk less and say more.
- 9) Remember that some things aren't for sale.
- 10) Know where to draw the line.

**COWBOY ETHICS:** What Wall Street  
Can Learn from the Code of the West

Author: James P. Bowen



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