



Robertson, Griego & Thoele

Area of Expertise: Wealth Management

Mark McClanahan

mmclanahan@rgtnet.com

214.360.7000

5950 Sherry Lane, Suite 700, Dallas, TX 75225

Company Overview:

For more than a quarter century, Dallas-based Robertson, Griego & Thoele (RGT) has served as the trusted wealth management advisor for affluent families across the country, and has been recognized both locally and nationally as a top tier wealth management firm, including the prestigious *Barron's Top 100 Independent Wealth Management Firms in the United States*. RGT's highly credentialed staff of 40 includes exceptional certified financial planners™, certified public accountants, chartered financial analysts, and juris doctorates who collaborate to serve more than 300 families with assets under management of approximately \$1.8 billion. RGT's comprehensive financial planning services work in tandem with a customized portfolio of public and private investments. Estate planning, income tax planning, and long-term financial goals are thoroughly considered before an investment plan is finalized and then monitored and repositioned to take advantage of the changing market environments. From entrepreneurs to celebrities, CEO's and professional athletes, RGT has helped clients successfully manage their financial future for nearly 28 years.

Year Founded:

1985

Core Services:

- Wealth Management
- Investment Management
- Financial Planning
- Family Office Services

What Makes Us Different:

- Independent and fee based in order to reduce potential conflicts with a client.
- RGT doesn't manufacture a product or receive any type of commissions. Compensation is fully disclosed along with performance on a quarterly basis.
- RGT isn't distracted by an edict from New York to sell products, the pressures to meet Wall Street earnings targets, or the requirement to answer to outside shareholders. Rather, energy is spent on serving the financial needs of RGT's affluent clients
- RGT won't manage your investments without having a sound, predetermined financial planning strategy in place for every client-- unlike other money managers. Financial planning services are a required component to RGT's complete financial services offering.
- RGT's well-credentialed staff includes 15 Certified Financial Planners, 9 Certified Public Accountants, 3 Chartered Financial Analysts and 4 Juris Doctorates.

A Snapshot of Our Client List: This information is confidential but available upon request



For more information about this Core24 approved provider, contact Sunny Nunan at sunnyn@core24.com or 972-498-1755