TCI WEALTH ADVISORS, INC.

25 YEARS 1990 - 2015

Trusted Planning For Life

25 Years of Investing in the Future
of our clients, their families, and our firm.

1990 1995 2000 2005 2010 2015

TCI was founded in 1990 with the goal of providing simple, truthful, trusted financial planning and investment advice. The timeline and facts highlight our history but cannot communicate the joy of service we experience, walking with our clients and their families through their financial lives.
Thank you!

TCI FACTS
• Advisors: 13
• Shareholders: 14
• Employees: 45
• 7 Locations serving clients in 40 states and 9 countries
• Average Tenure of all Employees: Over 7 years
• Average Tenure of Advisors: Over 11 years
• CERTIFIED FINANCIAL PLANNERS: 10
• CFA's: 2
• MBA's: 4
• MD's: 2
• CPA's: 2 (1 active)
• JD: 1
• RP's: 15
• PFS: 1
• **Independent** and Fee-only

1990 TCI Wealth Advisors, Inc (then known as The Conservative Investor) was founded by Bob Swift and operated out of the back of his house with a focus on providing educational classes.

2002 Commitment to firm-wide investment philosophy to academically researched portfolios.

2004 Commitment to being an independent 100-year firm.

2004 Decision to become a partnership and sell shares.

2007 Merged with AQN Advisors headquartered in Reno founded by Doug Nelson, CPA, PFS.

2012 ASPIRE by TCI created to provide sound financial education and advice to young professionals who are committed to saving and long-term financial success by waiving the minimum asset requirements generally required in the industry.

2015 TCI Foundation established as a non-profit corporation dedicated to personal finance education.