



Founded: 1990

Address: 6929 Greenway Pkwy.
Ste.150

Scottsdale, AZ 85254

Phone: 480.991.0401

Web: www.tciwealth.com



TCI Wealth Advisors Looking Towards the Future

1990 was a big year with the following headlines:

General Manuel Noriega Surrenders in Panama

South Africa Frees Nelson Mandela

The Hubble Space Telescope is Launched

And TCI's favorite news of all:

TCI Wealth Advisors Opens for Business in Arizona!

TCI has come a long way since Bob Swift founded the company out of his house in 1990 with the fundamental principle of providing comprehensive financial planning by putting clients' interests first through trusted, respectful, honest and open communication. TCI now has 14 advisors in seven cities serving clients in 40 states and 9 countries and is consistently ranked among the top registered investment advisory firms in the West. As TCI continues to grow, a few fundamental principles have and always will remain the same.

Total Client Satisfaction. TCI is dedicated to serving in a fiduciary role and building long-term

"The last 25 years have been a great journey, but the firm is just getting started."

relationships with our clients to simplify their lives by planning and navigating life's financial decisions. Each client's plan is based solely on their needs, goals and aspirations.

Independent and Fee-only. TCI is absolutely committed to remaining independent to protect our clients and the firm by removing any potential conflicts of interest. Furthermore, TCI believes the only way to provide unbiased financial guidance is to be fee-only. No hidden fees and no fine print. TCI's compensation comes solely from their clients.

Evidence-Based Investing. TCI has a long-term, disciplined approach to portfolio management. Their strategies are based off of a collection of the best evidence from the academic disciplines of economics and finance; including the Nobel prize-winning

research of Eugene Fama.

TCI's proactive process focuses primarily on client values, goals, interests, and desires allowing TCI to provide a complete financial solution — balancing wealth and well-being. TCI measures success not in dollars or rate of return, but rather in each client's ability to achieve their short and long term goals while maintaining financial peace of mind.

The last 25 years have been a great journey, but the firm is just getting started. TCI is committed to the concept of a 100 year firm — a company that is not only here to serve clients today but to serve their children and grandchildren into the future. The 100-year vision also extends to building a company where people want to develop and advance their careers through serving clients and mentoring the next generation of leaders to continuously define the standard of excellence in the financial industry.

"TCI's success would not be possible without our clients, business associates and friends," expressed Trisa Summers, advisor and CEO of TCI. "We cannot communicate the joy of service we experience, walking with our clients and their families through their financial lives. Thank you for a wonderful 25 years."

Celebrating 25 Years of Investing in the Future

of our clients, their families, and our firm.



TCI WEALTH
ADVISORS, INC.

Trusted Planning For Life

www.tciwealth.com • (480) 991-0401