Empowering Purpose-Filled Lives

TCI WEALTH ADVISORS

The Client Experience

Your life is about much more than your investments. While clients generally come to us first for investment management, they also find value in our comprehensive, objective advice on any financial issue. Whether your concerns involve investments, taxes, retirement, estate planning, insurance or charitable/education planning, we know how to ask the right questions and facilitate solutions tailored to you. We see this foundational approach as integral to creating trusting and lasting relationships with our clients, as it is one of many ways we fulfill our fiduciary responsibility to you.

1 **First, we listen.**

We begin with a discovery process that will help clarify your vision, goals, and objectives.

2 **We create a plan.**

In partnership with you, we create a cohesive and transparent plan that will help you achieve your aspirations.

3 **We commit, implement and coordinate.**

Once we mutually commit to one another, we implement your plan and coordinate our strategy with your team of external estate, tax, and insurance professionals.

4 **We communicate, monitor, and adjust.**

Throughout our relationship, we communicate regularly with you and your external team of professionals. We continually monitor the components of your plan to ensure that they continue to be effective and relevant in helping you achieve your lifetime goals. We make adjustments to your plan as necessary to match your evolving lifestyle and vision.

Trusted Planning for Life

We want to be your trusted advisor, partnering with you on your journey toward financial clarity, prosperity, and overall well-being.

Through insightful conversations, a financial plan and disciplined implementation, you and your loved ones can feel confident and empowered knowing TCI is committed to your success and advocating for your best interests. You have access to the expertise you need when you need it.

"We are passionate about helping people align their resources with what they value most to live a meaningful life. Life is meant to be enjoyed. It's not about the money."

-John Stephens MD, MBA, CFA, CFP®
CEO, Advisor and Shareholder

We are an independent, fee-only fiduciary providing comprehensive, coordinated and objective wealth management advice to individuals, families and retirement plans. We serve as a trusted advisor partnering with our clients on their journey toward financial clarity, prosperity and overall well-being. Our mission extends beyond simply helping clients manage their money; we also believe we have the opportunity to help clients develop a more robust understanding of the relationship between their money and their happiness. Our wealth management process helps clients align their primary resources (money, time, energy) with their priorities. We help clients plan for the future while also helping them live purpose-filled lives today.

We believe in a disciplined, evidence-based investment approach rooted in proven academic research. We recognize that markets are generally efficient and that one of the most important things we can do for our clients is to help them, create a portfolio aligned with their goals and risk tolerance. We emphasize low-cost investment solutions and tax-efficient strategies.

6	$2.5B+	29
Offices	**Assets under Management**	**Years of Service**

With six offices and over $2.5 billion in assets under management, we are large enough to provide sophisticated solutions to complicated problems, yet small enough to have a personalized relationship with you and your family. We are a values-driven organization empowering, educating and advising clients as they work toward their personal definition of success.

TCI Values

INTEGRITY

Our allegiance is to our clients. As a fiduciary, we always act in the best interests of our clients.

EXCELLENCE

Excellence lifts us all. We strive to define the standard of service all clients should receive in the financial industry.

WELL-BEING

Life is meant to be enjoyed. We are passionate about helping people make decisions that align their resources with what they value most in life.

INDEPENDENCE

We are all in, all the time. We are invested in our clients, our team and our communities. We are committed to being a 100 year firm; a firm that will grow and evolve to serve our clients today and for generations to come; a firm that is owned by shareholders who are all active in our company and our mission.

EMPATHY

People are always at the core of our business. We have a genuine interest in who you are and what you truly value. We exist to empower our clients and team to lead purpose-filled lives.

DISCLOSURE

Past performance may not be indicative of future results. Different types of investments involve varying degrees of risk. Therefore, it should not be assumed that future performance of any specific investment or investment strategy (including the investments and/or investment strategies recommended and/or undertaken by TCI Wealth Advisors, Inc. ("TCI"), or any non-investment related services, will be profitable, equal any historical performance level(s), be suitable for your portfolio or individual situation, or prove successful. TCI is neither a law firm, nor a certified public accounting firm, and no portion of its services should be construed as legal or accounting advice. Moreover, you should not assume that any discussion or information contained in this document serves as the receipt of, or as a substitute for, personalized investment advice from TCI. Please remember that it remains your responsibility to advise TCI, in writing, if there are any changes in your personal/financial situation or investment objectives for the purpose of reviewing/evaluating/revising our previous recommendations and/or services, or if you would like to impose, add, or to modify any reasonable restrictions to our investment advisory services. A copy of our current written disclosure Brochure discussing our advisory services and fees is available upon request. The scope of the services to be provided depends upon the needs of the client and the terms of the engagement.

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CENTRE FOR FIDUCIARY EXCELLENCE

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