Empowering Purpose-Filled Lives

TCI WEALTH ADVISORS

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.

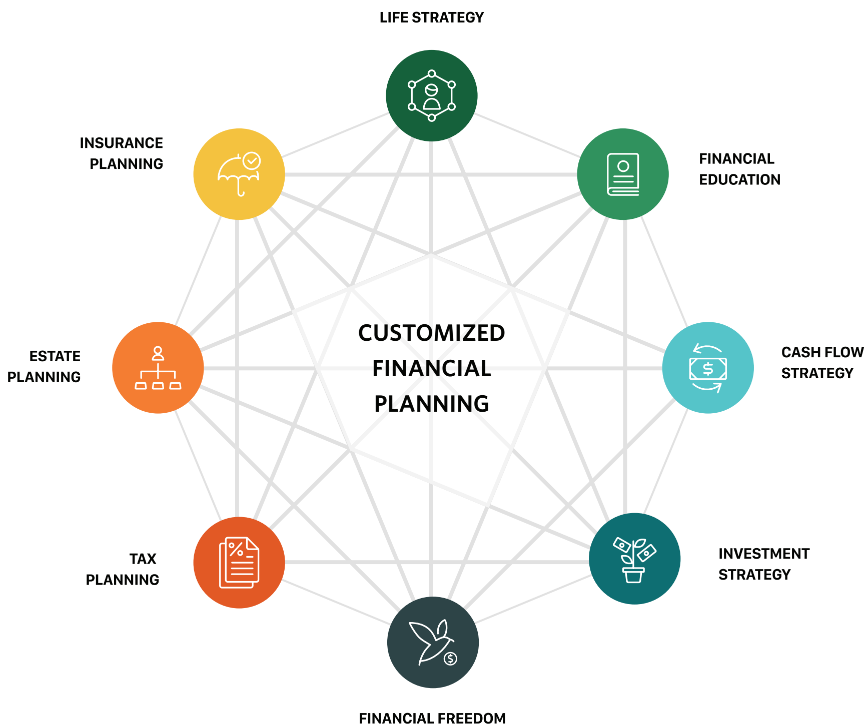
We believe in a disciplined, evidence-based investment approach rooted in proven academic research. We recognize that markets are generally efficient and that one of the most important things we can do for our clients is to help them create a portfolio aligned with their goals and risk tolerance. We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

5	$2.5B+	30+
Offices	**Assets Under Management**	**Years of Service**

With five 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.

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.

TCI Values

TEAM TCI

We are humble, emphasize Team TCI and define success collectively rather than individually.

CLIENT FOCUS

All TCI clients are my clients and I provide each of them with my very best.

ATTITUDE FOR BETTER

We strive to find innovative ways to approach situations, embrace challenges, maximize opportunities and collaborate to find solutions.

CARING

We communicate with honesty and kindness, treat every person we encounter with respect and seek opportunities to develop, mentor and motivate each other.

ABUNDANCE

We lead with thoughts of abundance not scarcity. We share our time and resources so we can contribute, celebrate, and share in each other's success.

BALANCE

We work hard and smart so we can offer the best version of ourselves to our clients, colleagues and communities but not at the cost of sacrificing ourselves, our families nor our colleagues.

DISCLOSURE

TCI WEALTH ADVISORS

CENTRE FOR FIDUCIARY EXCELLENCE

tciwealth.com

TUCSON I SCOTTSDALE I FLAGSTAFF I DENVER I RENO / TAHOE