OUR CORE VALUES

CONTACT US

EXCELLENCE

Every day we are getting better at getting better. We hold ourselves and our colleagues to high standards. We own not only our successes but also our failures, and seek to improve on them.

DO WHAT YOU SAY

If a commitment is made, a commitment is kept. We take responsibility for these commitments to our clients and our colleagues. Our belief is that trust takes a lifetime to earn, and a second to lose. We earn that trust each day we open our doors.

DO THE RIGHT THING

Why? Because it is the right thing to do. Broken trust can never be won back.

COLLABORATE

We believe in team before self, and that great ideas can come from anyone. We believe in listening to understand, not respond. Together, we go far and accomplish great things.

SERVICE MINDED

We are passionate about improving the lives of our clients and those important to them. We will go the extra mile to deliver service and support that stands out above the rest. OKLAHOMA CITY 9108 N. Kelley Oklahoma City, OK 73131 (405) 478-1971

DALLAS 1845 Woodall Rodgers Fwy., Ste. 1050 Dallas, TX 75201 (972) 985-7162

PLANO 3930 Dallas Pkwy., Suite 450 Plano, TX 75093 (972) 985-7162

SAN ANTONIO 7373 Broadway, Ste. 400 San Antonio, TX 78209 (210) 738-3888

CHARLOTTE 13801 Reese Blvd., Ste. 155 Huntersville, NC 28078 (704) 659-7817

CINCINNATI 201 E. Fifth St., Ste. 1900 Cincinnati, OH 45202 (203) 298-8523 OLD LYME 83 Halls Rd., Ste. 205 Old Lyme, CT 06371 (860) 434-5999

GUILFORD 246 Goose Ln., Ste. 201 Guilford, CT 06437 (203) 458-6800

NEWTOWN 41 University Dr., Ste. 400 Newtown, PA 18940 (203) 298-8523

STAMFORD 1266 E. Main St., Ste. 700R Stamford, CT 06902 (203) 298-8523

TAMPA 100 S. Ashley Dr., Ste. 600 Tampa, FL 33602 (813) 723-1274

WESTLAKE VILLAGE 100 N. Westlake Blvd., Ste. 203 Westlake Village, CA 91320 (805) 435-0030

Exencial Wealth Advisors

exencialwealth.com

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Financial well-being made simple with local advisors.

INVESTMENTS

FINANCIAL PLANNING

ESTATE PLANNING

TAX PLANNING

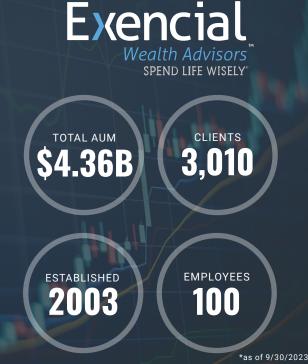


ABOUT US

INTEGRATED SERVICE PLATFORM[™] (ISP)

Exencial is a national Registered Investment Advisor that began in 2003 with a foundation of superior advice and execution. Since our genesis, we have constructed a team of CPAs, CFA Charterholders, CFP®s, and CIMA®s to execute across the many disciplines of wealth management. These disciplines include tax preparation, individual investment management, financial planning, estate plan construction, risk management, and philanthropy.

Our clients have access to the Portfolio Management Team whose members oversee our investment management strategies that include individual stocks, individual bonds, options, ETFs and mutual funds.





BANKING & LENDING Sourcing and advising on credit providers and ensuring optimal



ナニ × シ ESTATE PLANNING & TRUST SERVICES

account structure.

Insurance, planning, and design.

FINANCIAL PLANNING Platform

Balance sheet, cash flow statement, strategy, and execution.

CONSOLIDATED REPORTING

Aggregation from the reporting on trusts and estate flows to outside assets with other advisors.

INVESTMENT PLATFORM

Customized portfolios with Individual stocks and bonds, mutual funds, or ETFs.

TAX & ACCOUNTING PLATFORM

Planning, preparation filing, and coordination

ADVISORY TEAM

9 18 CFA CPAs Charterholders



OTHER*

8

* Other includes JD, PFS, CIMA, and CTFA

THE E³ PHILOSOPHY

E3, shorthand for "Evaluate, Execute, Evolve", is more than a continuous improvement process — it is a guiding principle for our firm. We evaluate each client's specific



situation and goals, execute a plan that is designed to achieve a steady flow of information between our investment, tax and estate planning teams, and evolve our approach as needed to drive success.