OUR CORE VALUES

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.

CONTACT US

OKLAHOMA CITY
9108 N. Kelley
Oklahoma City, OK 73131
(405) 478-1971

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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

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Wealth Advisors™

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Financial well-being made simple with local advisors.

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- FINANCIAL PLANNING
- ESTATE PLANNING
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ABOUT US

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.

Exencial
Wealth Advisors™

TOTAL AUM	CLIENTS
$5.50B	3,221
ESTABLISHED	**EMPLOYEES**
2003	110

*as of 9/30/2024

INTEGRATED SERVICE PLATFORM™ (ISP)

BANKING & LENDING
Sourcing and advising on credit providers and ensuring optimal account structure.

ESTATE PLANNING & TRUST SERVICES
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 CFA Charterholders

18 CPAs

14 CFP®s

8 OTHER*

** Other includes JD, PFS, CIMA, and CTFA*

THE E^3 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.