

RYAN PRIMARY:

So, our value proposition? We do what we say we're going to do.

We do have a tagline here. We talk about it a lot at Presidio Group Wealth Management. It's being *Invested in you*, it's being invested in *your family*, invested in *your future*. If I could sum up how we see clients, our process and the way we treat people - it's that.

Money's just a currency. The real investment that we make is in people. We become invested in your success and the future you're trying to build. It's hard even sitting here talking about ourselves because on the one hand I want people to know how incredible our team is - but on the other hand every wealth management firm should be completely focused, and totally invested in their clients. Not every firm sees clients that way. Not every firm has that level of commitment or drive - seeing growth as an outcome of caring for clients.

It's amazing when you get people who are in their 20s or 30s who think 30 years out to retirement, but oftentimes we meet people and they're just a few years out from retirement. And they're wondering - can I actually do this? Can I stop working? Can I still live the life I've worked so hard to build?

That's a huge transition. It's emotional, and it's not just about spreadsheets - it's about identity, freedom, family, purpose.

When someone calls us - I don't want them to feel nervous. I want them to feel known and to feel heard and seen.

I want every client to be treated the way I want my mom to be treated. That's it, that's the entire standard that we're trying to live up to.

When you become a client, we become invested in you - your family, and your future. So, if you're looking for an advisor who takes your future seriously, someone who will invest in you - we'd love to talk.