

Mission and Purpose

JOURDAN:

My parents came to the U.S. with nothing but a dream - to give their kids a better life. They didn't grow up with wealth. They didn't talk about investments, or retirement - but they worked hard so I could have opportunities they never had. That shaped how I see planning. Planning creates opportunity. It helps the people you care about most and gives you the greatest gift of all - confidence.

ERNEST

It takes time to become a client here. We meet you multiple times before we ever move a dollar. Because we want to get it right.

We want to understand how you think, what you care about, what you're walking through—because your strategy should reflect your values.

What do you want? What worries you? Where do you see yourself in 5, 10, or 20 years? That's where planning begins.

Once we have a plan in place - we stress test it to determine if that plan can withstand challenges.

If something happens tomorrow, what's the backup plan? When the market inevitably drops, are you prepared? If you lose a source of income, do you know what to do next?

RYAN:

Let's face it, this industry is filled with noise. Everyone has a 'hot tip' or a 'can't-miss opportunity.' But the truth is, real wealth is built on strategy.

At Presidi Group Wealth Management, we execute. We follow a disciplined, structured approach focused on what we call economic realities, not market hysteria.

If you're trusting us with your wealth, you deserve to understand what's happening with your

money. We'll walk you through the 'why' behind every decision—so you're an active participant in your financial journey.

ERNEST:

This is a lifelong partnership. Our goal isn't to help invest and walk away—it's to make sure we're with you every step of the way, so you thrive in every stage of life.

JOURDAN:

And legacy matters. Whether it's passing on generational wealth, supporting causes you care about, or just making sure your family is financially secure—we help you craft a plan that extends beyond your lifetime.

RYAN:

At Presidio, we're invested. In you. In your family. And in your future.