HARVEST
FUTURE FINANCIAL

In determining what I would spend my working life on, I could not find anything more meaningful than helping striving families in the community I have grown up in live up to their financial potential. My duty is ingrained in a personal drive, a family history, and commitment to my community. I believe my most important role is helping clients make better and timely informed decisions through with support from my firm's experience.

Away from work, I enjoy walking my dog, attending social running clubs, spending time with family at the farm, working on latest DIY project, or very likely heading to a park to see all that nature has to offer.

I grew up in a farming culture which valued financial security rooted in ownership and independence. Watching my parents grow a family and build a successful farm in an ever-modernizing culture, I learned was the importance of delayed gratification, hard work, and embracing new technology. Over the years of meeting numerous challenges, I saw the ongoing investment in the business and the constant effort it took to run a successful business. Professional advice and financial instruments played an important part in supporting what happened in the fields and at the dinner table. This mindset and the level of care it takes to protect and grow wealth through a changing landscape have been programmed into me.

In starting my financial planning practice, I wanted it based on relationships, not transactions. Going into a male dominated field, I knew it had to be personal. I had to do it where I called home, with those I care about the most. In learning about investing and coaching myself, felt easy and intuitive. Before starting in this career, I realized most people around me didn't feel the same way. That was a source of worry, insecurity, or embarrassment, exactly the opposite of what a financial planner wants. I decided to create a business out of empowering families to take action, control of their finances, and to secure their financial future. My greatest satisfaction comes from seeing people grow in their vocation, family, find more financial freedom, and give the advice I would have want my family to have.

Qualifications and Associations:

Certified Financial Planner
University of Texas, Austin – Degree in Government
FINRA Series 7 and 66
Texas Group 1 –Life, Accident, Health, and HMO
Notary Public
Licensed since 2007
Past Board member of San Antonio LGBT Chamber of Commerce

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