EPIPHANY
Wealth Management

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As a professional athlete with a complex financial profile to manage combined with limited time, you will want to collaborate with a proven leader that can position you for long-term success on multiple fronts:

ADVISOR PROPOSITION

- Investment Management
- Business Manager
- Collaborative teammate
- Entrepreneurship advocate
- Accountability partner
- Strategic Visionary

Epiphany Wealth Management Overview:

- Independently owned and operated Registered Investment Advisory firm offering a full suite of personal financial planning and wealth management services.
- Personal financial services including tax planning; retirement planning; risk management; investment planning/portfolio management; cashflow management; and post career transition financial planning.
- More than 25 years finance expertise in addition to agent certifications, a rarity in the sports world!

Founder Credentials/Finance Subject Matter Expertise:

- **SE-AWMA –** Sports & Entertainment Accredited Wealth Management Advisor designation earned via the College for Financial Planning
- **CPA/PFS –** Certified Public Accountant for 23+ years; distinguished Personal Financial Specialist (**PFS,** earned via the American Institute of Certified Public Accountants**)**
- **ChFC -** Chartered Financial Consultant designation earned via the American College of Financial Services.
- **RICP -** Retirement Income Certified Professional earned via the American College of Financial Services
- **Education:** B.S., Accounting; **MBA** (Both earned at Louisiana State University)

The athlete client will not only benefit tailored guidance, but will also have access to professional insight including, although not limited to the following:

Focused on your present….

- Strategic Investments & advice
- Access to personal finance expertise
- Financial risk management, asset protection
- Efficient Tax Planning
- Value added mentorship

Locking Down your future!

- Long-term income planning/wealth creation
- Advanced post-career transition planning
- Future proofing your investment portfolio
- Alternative investment strategies
- Access to emerging investment opportunities

Collaborative Opportunity:

- Strategic alignment offers athlete clients (and family stakeholders) the opportunity to partner with a proven leader that not only provides critical financial stewardship, advice, and counsel, but also authentically identifies and empathizes with the client.

Associations/Memberships

- American Institute of Certified Public Accountants (AICPA)
- African American Association of Financial Advisors
- National Black MBA Association

Mentorship Programs

- Greater Houston Partnership – Mentor Collective
- National Black MBA Association Volunteer Mentor
- Louisiana State University Mentor - First Generation Students