BOB HIGLEY

"Client Satisfaction is the Gold Standard by Which to Judge One's Success as an Advisor" — Bob Higley

- Comprehensive customized portfolio planning
- Establishing investment risk tolerances and financial objectives
- Wealth management, retirement planning and tax-advantaged investing

Having entered the investment business in 1972, Bob Higley has lived 37 years of actual market experiences with his clients. For Higley, a client's money has dual meanings: net-worth and life style.

Higley terms investor net-worth, "deferred consumption." Life style is the opportunity to direct deferred consumption towards an important financial goal or objective during ones lifetime.

Acknowledging that all investments have risks, Higley sees his role as twofold: Thoughtful, conservative sustainer of net-worth and maintainer of life style. At the heart of both of these roles is a passion for understanding his clients and their individual objectives coupled with a disciplined approach to investment selection.

Bob received his undergraduate degree and MBA from the University of Texas. Higley readily admits that he has no hobbies. He explains, "… I find fun in my work … People take their money seriously … so do I …"

Bob and his wife are active in their church and in a foundation that they established. They have two sons and two granddaughters.

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