About Us

What Drives Us

Our purpose is to help clients build the financial foundation of a more secure, rewarding life, as well as a lasting legacy.

LET'S TALK. →

ABOUT US

An Architecture for Legacy Building.

We understand the path to building a lasting legacy can be populated with unexpected obstacles and extraordinary opportunities. Decisions made today can impact generations of loved ones and we recognize the importance of balancing demands like growing a deep investment portfolio, cultivating philanthropic opportunities and instituting a reliable family governance structure.

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BY ROBERT ROMAN

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Approach

Our process begins with a defined and comprehensive understanding of each of our client's unique needs and aspirations. Building from that foundation, we develop a highly tailored strategy that accounts for the full dimensional spectrum of our clients' financial matters. Beyond the numbers, we help out clients define their own legacy

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Services

- Goal Planning
- Asset & Investment Management
- Estate & Succession Planning
- Cash Management
- Retirement Planning

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ABOUT US

Our Team

Robert Roman

Chief Executive Officer

Robert has over 20 years of experience in wealth management providing financial services to families through multi-generational forward-thinking solutions. He started his career at UBS where he spent 10 years catering to affluent high net worth individuals, families and corporations. Robert is known as a leading financial advisor in the entertainment and sports industries. From financial planning to portfolio creation and asset management, Robert understands that it takes not just financial planning but financial doing to meet the needs of his clients.

Louis Barajas

Chief Operating Officer

Louis Barajas is the chief financial officer and business manager for all clients at the firm. He is an internationally recognized expert in financial and business issues. His unique experience of helping the ultra-rich to the person in need gives him a unique human perspective in the world of finance. This unique experience has been expressed in 5 books, many keynote addresses and interviews around the globe. Louis' priorities are his family, faith, and his firm.

CONTACT US

How can we help?

Questions? Let's talk. Discover a truly unique approach to wealth managment. Call or contact us online to get the conversation started.

+1 888.880.5724

Name

Email

Company

Questions/Comments

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