YOUR TEAM AT SOLIS WEALTH MANAGEMENT

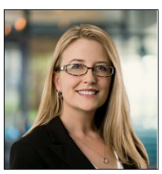
Your experience is our top priority. We are committed to providing you with proactive, high-touch service that is both personal and professional. We want you to feel confident in knowing who to contact for any need that may arise.

Your Wealth Management Team

Your primary advisor is your main point of contact for all strategic matters. However, as a cohesive team, we are all familiar with your financial plan. If your primary advisor is unavailable, please feel free to reach out to any of the advisors below for assistance.

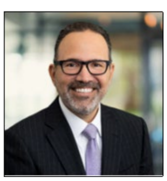
Greg R. Solis, Founder & CEO
greg@soliswealth.com | **Text: 760-418-6184**

- Strategic planning & advanced wealth management
- Estate, tax, insurance, and retirement guidance
- Chair of the Investment Committee



Tiffany Valentine, President & Wealth Advisor
tiffany@soliswealth.com | **Text: 760-548-3766**

- Comprehensive financial planning & investment guidance
- Oversees all departments to ensure seamless client service
- Member of the Investment Committee

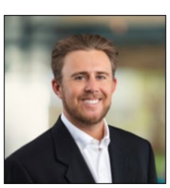


Luis Carrera, Wealth Advisor
luis@soliswealth.com | **Text: 760-978-6800**

- Financial planning, retirement & college funding strategies
- Tax-efficient investment planning
- Member of the Investment Committee

For Investment Trading & Research

Our trading and research team ensures your portfolio stays aligned with your goals. They work closely with your advisor to execute trades and conduct in-depth analysis.



Jack Solis, Research and Planning Assistant
jack@soliswealth.com | **Text: 760-282-4985**

- Lead trader: executes trades and keeps accounts aligned with your plan
- Conducts investment research and analysis
- Prepares planning materials and meeting deliverables

SWM SOLIS WEALTH MANAGEMENT, INC.

For Your Day-to-Day Account Service

Our service team ensures your requests are handled with speed and care. They are your first point of contact for all operational tasks, including account questions, money transfers, and online access.

Tami Salzer, Director of Operations & Wealth Advisor
tami@soliswealth.com | **Text: 760-313-3449**

- Oversees service team and operational processes
- Primary contact for complex requests or escalations
- Supports planning, trading, and research needs

VonCile Graham, Client Service Associate & Executive Assistant
voncile@soliswealth.com | **Text: 760-819-7161**

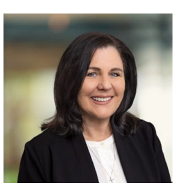
- Handles **transactions**: deposits, withdrawals, transfers
- Guides new clients through **onboarding**
- Provides executive support to Greg

For General Questions & Appointments

Our office management team is here to provide seamless support. They manage our client events, schedule appointments, and welcome you to our office.

Debbie Hartley, Director of Office Management
debbie@soliswealth.com | **Text: 760-501-2767**

- Plans and manages client and office events
- Coordinates schedules, calendars, and reports
- Oversees marketing initiatives



Nancy Portolesi, Administrative Assistant
nancy@soliswealth.com | **Text: 760-771-3339**

- First point of contact for client calls
- Welcomes clients, visitors, and vendors
- Provides general office support and event assistance