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# Partnering with families to ensure smart decisions about their wealth

**Focus on  
What's Important**

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**Allegiance  
to You**

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**Intelligent  
Strategies**

([https://videos.dimensional.com/video?v=0\\_b8cwb486&p=20e572a1-b50d-4816-8097-eaa3d22a0153&f=false&d=false](https://videos.dimensional.com/video?v=0_b8cwb486&p=20e572a1-b50d-4816-8097-eaa3d22a0153&f=false&d=false))

**For over 20 years, Optima Asset Management, based in Dallas, has employed a holistic, multi-generational approach to wealth management. The vision on which the firm was founded in 1995, still holds true today: provide clients a better alternative to the Wall Street firms by working exclusively for their best interests and helping them to be smart with their wealth. In this way, we empower our clients to effectively control the purpose of their wealth.**

## **STRATEGIC ALLIANCES**





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**Ameritrade**  
Institutional

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**Charles Schwab & Co., Inc.**

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*Strategic Alliances Disclosures*

(/strategic-alliances-disclosures)



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