Welcome

The Sather Financial Group Inc. is a “fee-only” financial planning and investment management firm responsible for overseeing approximately $600 million in client assets.

It is our belief that a “fee-only” financial planning and investment management business is the best way to take care of clients, always putting their interests first. In this manner, no income is derived from commissions or any other type of transaction oriented activity. All fees are earned as a result of asset management fees. Given this, the goals of the Sather Financial Group, Inc. remain aligned with the clients.

As a Registered Investment Advisor, ***we function as a Fiduciary, not as a salesman***. A Fiduciary is legally obligated to do what is in the client’s best interest, whereas a salesman (ie-stockbroker) attempts to sell a product--whether or not it is in the client’s best interest.

Given this structure, if our client’s assets increase in size we get a pay raise. Conversely, if our client’s assets shrink, we take a pay cut. This platform is the best way we know of to keep our goals aligned with our client’s. It motivates us to keep client’s commissions and taxes low and make decisions that lead to increased wealth.

The focus of the Sather Financial Group, Inc. is based upon offering; ***customized, individual financial planning and investment management.***

In doing so each client has the opportunity to efficiently, and effectively, coordinate the following:

1. Investments

2. Taxes (derived from investment activity)

3. Insurance (home, health, life, auto, liability)

4. Estate Planning (wills, trusts, power of attorney or health care)

5. Retirement Plans

6. Asset Acquisition (vehicle or other property negotiations)

Objectivity is obviously quite critical in developing a program that will take care of a client in the best manner possible. We don’t sell any type of product, fund family or work for any brokerage firm. The only person we represent is our client. As such, conflicts of interest are minimized.

Ultimately, the goal of the Sather Financial Group, Inc. is to take clients from point “A” today to point “B” in the future in the most logical and competent manner. In doing so, the clients’ interests are always put first.

If the services of the Sather Financial Group, Inc. interest you, or if you just have questions, we can be reached at 361-570-1800 or E-Mail at Dave@SatherFinancial.com.

Contact Us

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