A multi-family office that starts with you.

Tolleson Wealth Management exists to help clients navigate the financial and emotional complexities of wealth. Every family is unique and our goal is to provide a comprehensive approach that is both objective and customized.

OUR STORY

The story of Tolleson Wealth Management starts with family. A third-generation banker, John Tolleson founded a single-family office to address his complex needs and keep the family's best interests in mind.

Combining this foundation and a desire to serve others, we quickly grew into a solution that could benefit many families. Today, our comprehensive services continue to serve families of substantial wealth.

1997
John Tolleson opens a single-family office to manage his family's needs

2000
Tolleson Wealth Management is founded to serve the needs of other families

2003
Tolleson Private Bank is formed

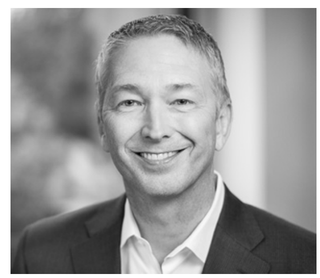
2006
Activated our trust charter, allowing us to serve as corporate trustee for families

2008
Tolleson Wealth Management Speaker Series is launched

2014
Began providing philanthropy services and foundation management

2017
John Tolleson becomes Executive Chairman, Carter Tolleson named CEO and Richard Joyner appointed President of Tolleson Wealth Management

“Our team structure allows us to work together to address our



MEET OUR FULL TEAM

COMPREHENSIVE SERVICES, DELIVERED IN CONCERT

Strategic Wealth Management & Financial Planning
Investment Management
Trusts & Estates
Philanthropy
Family Education & Governance
*Tax & Bookkeeping**
Private Banking

JUNE 13, 2019 | NEWS & EVENTS

Generations Serving Together at North Texas Food Bank

More than 45 employees and their families served together at North Texas Food Bank (NTFB) last weekend for a food packing project. Participants assisted in the organization's hunger relief efforts that serve 190,000 meals for hungry children, seniors, and families across North Texas each day. The activity included an opportunity to learn about the community […]

MAY 30, 2019 | NEWS & EVENTS

Celebrating Summer at the Annual Tolleson Wealth Management Picnic

Employees were treated to games, activities, and food at the Tolleson Wealth Management annual picnic this month. The Tolleson family held the festivities in the backyard of their home. As a treat to go along with the competitions during the picnic, prizes were awarded to the winners in each category. The firm donated additional toy […]

MAY 16, 2019 | NEWS & EVENTS

Making Caring Cool with our Family Education Speaker Series

Tolleson Wealth Management hosted WE Charity founder and Social Entrepreneur Craig Kielburger for a recent Family Education Speaker Series event at Dallas Country Club. Craig gave valuable insights to the audience about how to involve the rising generation in philanthropic activities and how to 'make caring cool.' He told stories that ranged from speaking with […]

MAY 14, 2019 | NEWS & EVENTS

Recognizing the Top Mergers & Acquisitions in North Texas

Tolleson Wealth Management was the presenting sponsor of this year's D CEO Mergers and Acquisitions Awards last week. The awards ceremony featured opening remarks from Richard Joyner, President, a panel of dealmakers to give insight into working on large deals, and featured the winners of each category, including dealmaker of the year. "At Tolleson Wealth […]

CAREERS

As we serve our clients, we value employees and company culture just as much.

We are continuous learners who are passionate and purposeful. Our team is made up of self-starters who enjoy a workplace that's collaborative and engaging. We believe in building relationships, making a difference in the lives of others and constantly seeking ways to create and innovate.

Interested in working with us? Learn more about our opportunities.

TOLLESON WEALTH MANAGEMENT
5500 Preston Road, Suite 250
Dallas, Texas 75205
(214) 252-3250

TOLLESON PRIVATE BANK
5550 Preston Road, Suite B
Dallas, Texas 75205
(214) 252-3033