private wealth

ASSET MANAGEMENT



FOCUSED ON YOUR SUCCESS

We are your FAMILY OFFICE

that's committed to providing expert counsel exclusively to families and institutions.





ABOUT US

The Future of Private Wealth Management

We created Private Wealth Asset Management with a singular focus and mission: to put the client first. As a team, we strive to make managing the complexities and decisions impacting the financial and nonfinancial priorities of high-net-worth families and institutions easier. Our highly credentialed financial professionals build relationships with our clients and bring decades of experience to serve their needs. We approach each of our client relationships individually, getting to know their unique goals and concerns, understanding what is most important to them, and sharing their values.

We know that clients need specialists to respond to the ever-changing and increasingly complex aspects of their lives. It takes a team of experienced advisors to provide proactive, relevant advice to high-net-worth individuals and families. We are proud of our team structure, surrounding the client with professionals who have specialized knowledge from various disciplines. Our advisors help clients navigate the complexities of wealth and legacy planning, pre-transaction business planning, full-balance sheet wealth management, lifestyle and cash flow planning, and philanthropy.

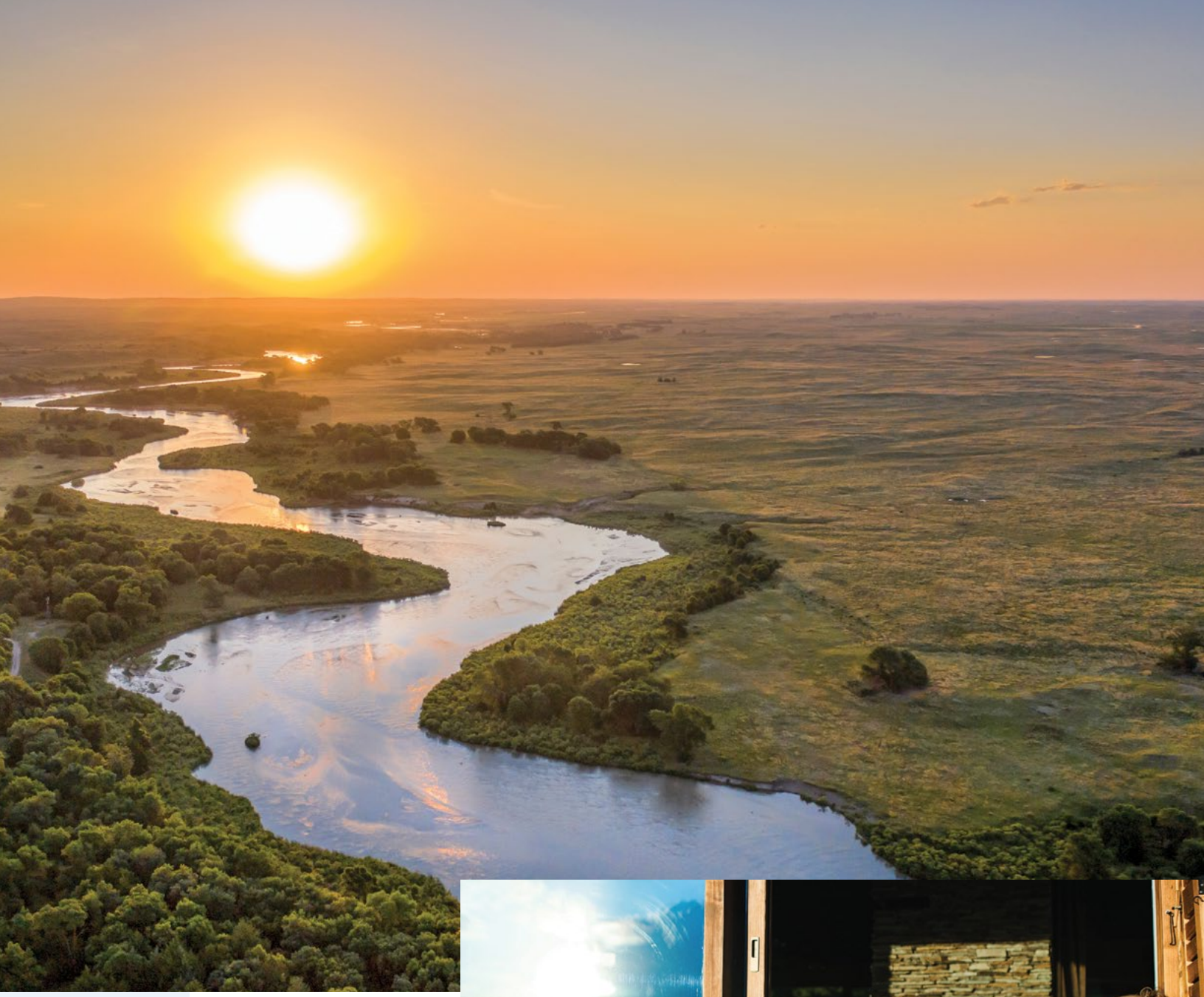
As an independent wealth management firm, we have the flexibility to adapt to the changing needs of clients. We strive to be a proactive partner, working with clients and their other trusted advisors to identify opportunities and risks. We adjust to the changing landscape, whether in the markets or their personal lives.

Our clients value our advice, recommendations, and expertise developed from decades of experience helping similar clients through both routine and complex issues. They want to speak to a person they know, and who knows them personally. Our services are delivered locally, with depth and breadth of experience.

We built Private Wealth with the future in mind. Each experienced advisor is encouraged to plan for their own succession, hiring and mentoring the next generation of professionals to ensure continuity of service to our client relationships.

The Private Wealth team of advisors/ principals has over 500 years of combined experience in wealth management. We will meet you where you are with a team that is in it for the long term. Our company culture is defined by integrity, collaboration, curiosity, fun, community, and putting our clients' interests at the center of all we do.

Investment Advisory Services offered through Private Wealth Asset Management, LLC.





Our Specializations
AND SERVICES

Scope of WORK

Our privately held, independent wealth management and planning consulting firm serves as a multi-family office to successful business owners, families with generational wealth, people with unique or complex financial situations, and wealth creators who are in need of holistic wealth planning.

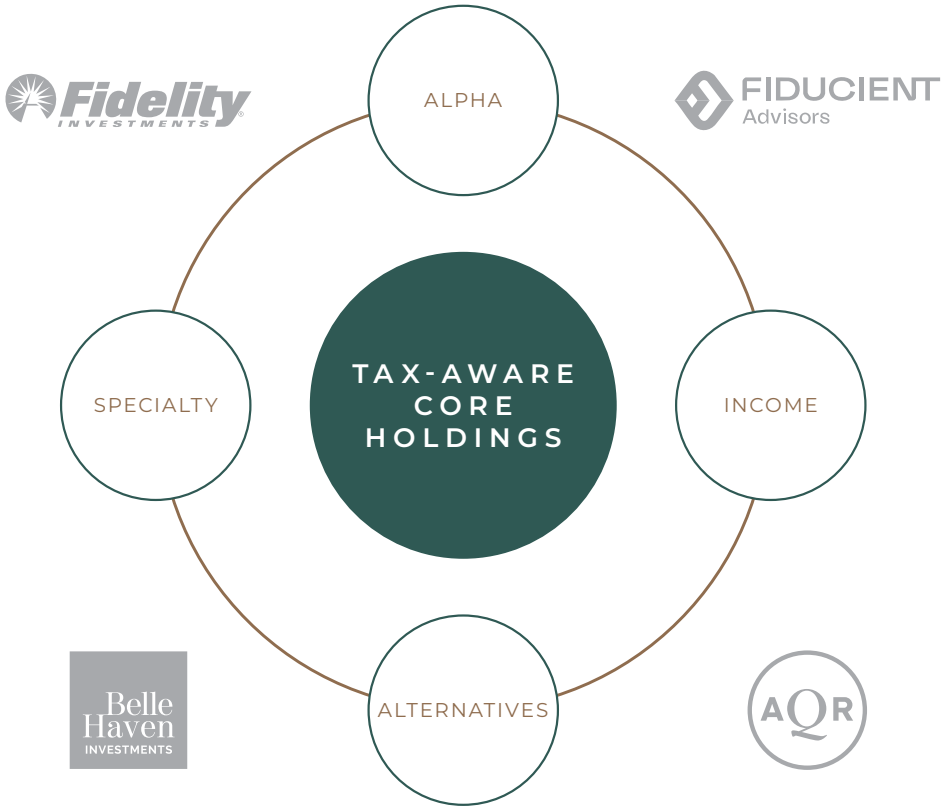
- ESTATE PLANNING
- LEGACY PLANNING AND MULTI-GENERATIONAL WEALTH TRANSFERS
- COMPREHENSIVE RISK MANAGEMENT
- OIL, GAS & MINERAL MANAGEMENT
- LIFESTYLE AND CASH FLOW PLANNING
- PRE-SALE AND BUSINESS TRANSITION PLANNING
- CUSTOM PORTFOLIO MANAGEMENT
- TAX-AWARE INVESTING
- REAL ESTATE MANAGEMENT
- INTENTIONAL PHILANTHROPY AND GIFTING
- BANKING AND LIQUIDITY MANAGEMENT

True independence and fiduciary advice serve as the foundation for our body of work, and through this, we help our clients avoid the potential unintended consequences of critical wealth decisions. Navigating the world of financial, legal, tax and risk management is challenging for many families, but we built our firm around being solution-agnostic and bringing the right team to the table when these opportunities arise.

Investment Advisory Services offered through Private Wealth Asset Management, LLC.

Investment Management

PROCESS & STRUCTURE



CORE PORTFOLIO

CORE EQUITY, TAX AWARE AND HEDGED OR UNHEDGED

- Customized Focused Portfolio
- Tax-Aware/Efficient Russell 1000 or 3000 with substantial tax loss harvesting capabilities
- Can also be implemented with mutual funds and exchange-traded funds (ETFs)

CORE BONDS

- Individual bonds where appropriate
- Custom tax approach
- Bond substitutes with similar risk profile and income

SATELLITE PORTFOLIOS

ALPHA

- Concentrated Positions
- Sector Tilts
- Tax-Advantaged

INCOME

- High Dividend
- Preferred Stock, MLPs
- REITs

SPECIALTY

- Dynamic Hedging
- Natural Resource Management
- Pre-IPO

ALTERNATIVES

- Digital Assets
- Private Capital
- Real Assets

Investment Advisory Services offered through Private Wealth Asset Management, LLC.



Meet the TEAM



CONTACT

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Russell Samples, CTFA®

FOUNDING PARTNER, MANAGING DIRECTOR

Russell Samples is a Founding Partner and Managing Director of the Private Wealth San Antonio office. With expertise in trust/estate planning, tax management/planning and budgeting/bill pay, he manages wealth and financial planning for high-net-worth individuals, families and foundations. He specializes in working with business owners and succession planning.

Russell was born and raised in Terrell, Texas, and still lives in the North Texas area. He and his wife of over 33 years have two daughters and six grandchildren. When he is not providing solutions to clients and prospects, Russell enjoys traveling the open waters, deep-sea fishing and firing up his grill for family cookouts. Additionally, he has fun adding to his collection of sports and entertainment memorabilia.

HISTORICAL RELATIONSHIP TENURE

- 14 years

YEARS OF EXPERIENCE

- 33 years

EDUCATIONAL BACKGROUND

- University of Texas, BA, Business Administration with Honors

DESIGNATIONS/CERTIFICATIONS/CLASSES

- Certified Trust and Financial Advisor, American Bankers Association/Institute of Certified Bankers (CTFA®)
- Graduate of the Texas School of Trust Banking
- Graduate of Cannon Trust School I, II and III
- Graduate of the Darla Moore School of Business, University of South Carolina, Graduate School of Bank Investments and Financial Management

COMMUNITY INVOLVEMENT

- Terrell State Hospital Volunteer Services Council - Board Member
- College Mound Cemetery Association - Board Member

Investment Advisory Services offered through Private Wealth Asset Management, LLC.



CONTACT

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Debra Wilkens, CFA®

FOUNDING PARTNER, SENIOR PORTFOLIO MANAGER

Debra is a Founding Partner and Senior Portfolio Manager at the Private Wealth San Antonio office. She specializes in building customized investment portfolios to meet the unique needs of high-net-worth individuals, families, foundations and endowments. Additionally, she is a member of our Investment Committee.

Outside of work, Debra serves on her local PTA board. She is passionate about ensuring that children have access to essential resources that enable them to learn and grow. In her role on the PTA board, she advocates for these important goals.

In her free time, Debra enjoys spending time outdoors with her husband and two sons. As a family, they love to travel, participate in sports, explore new foods, hike, and seek adventure in their everyday lives.

HISTORICAL RELATIONSHIP TENURE

- 17 years

YEARS OF EXPERIENCE

- 19 years

EDUCATIONAL BACKGROUND

- Baylor University, BA, Business Administration and Political Science (Summa Cum Laude / Valedictorian)

DESIGNATIONS/CERTIFICATIONS/CLASSES

- Chartered Financial Analyst (CFA®)

COMMUNITY INVOLVEMENT

- CFA Society Austin - Member
- PTA Board - Member

Investment Advisory Services offered through Private Wealth Asset Management, LLC.



CONTACT

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David Tawil, CTFA®

FOUNDING PARTNER, MANAGING DIRECTOR

David Tawil is a Founding Partner and Managing Director of the Private Wealth San Antonio Office. With expertise in portfolio management and trust/estate planning, David focuses on building customized solutions for high-net-worth individuals, families, foundations and endowments tailored to their individual goals. David has held numerous leadership positions over his 28 years in the financial services industry, but he is most proud of helping to found Private Wealth, creating a culture where clients truly come first. David co-chairs the Private Wealth Investment Committee and leads the Marketing Committee for the firm.

Outside of work, David enjoys fitness, playing golf, cooking and spending time with family and friends. He and his wife, Jodi, have four daughters who are currently in high school and college, as well as a new Goldendoodle named Scottie.

HISTORICAL RELATIONSHIP TENURE

- 15 years

YEARS OF EXPERIENCE

- 28 years

EDUCATIONAL BACKGROUND

- Texas State University, BBA, Finance

DESIGNATIONS/CERTIFICATIONS/CLASSES

- Certified Trust and Fiduciary Advisor (CTFA®)
- Fiduciary Graduate Program

COMMUNITY INVOLVEMENT

- Ballet San Antonio - Board Member (Governance Chair)
- Congregation Rodfei Sholom - Board Member

Investment Advisory Services offered through Private Wealth Asset Management, LLC.



CONTACT

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Liz Yzaguirre, MBA

CLIENT RELATIONSHIP SPECIALIST

Liz is a Client Relationship Specialist located in our Corpus Christi office. She is adept at coordinating teams of specialists, such as other advisors, attorneys, and accountants, to work toward achieving the clients' wealth and financial goals. She specializes in trust and estate planning, financial planning, and budget management, with a focus on elder and life care services.

Previously, Liz worked at Wells Fargo for 36 years, providing comprehensive wealth management strategies tailored to the clients' specific needs.

In her spare time, Liz is a master gardener and maintains a variety of plants and flowers, with her favorite being the Plumeria. She has been married to Carlos for 40 years, and they have two sons and seven grandchildren that keep them busy year-round.

YEARS OF EXPERIENCE

- 40 years

EDUCATIONAL BACKGROUND

- University of the Incarnate Word, MBA, graduated with distinction
- University of the Incarnate Word, BA, Business Administration (Magna Cum Laude)
- Del Mar College, AAS, Banking and Finance

DESIGNATIONS/CERTIFICATIONS/CLASSES

- Graduate, Cannon Trust School I, II and III

Investment Advisory Services offered through Private Wealth Asset Management, LLC.



CONTACT

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Leslie A. Wall

SENIOR CLIENT ASSOCIATE

As a Senior Client Associate, Leslie serves as a key resource for client inquiries, day-to-day service needs, operations, account management, documentation, customer service and technical assistance. She specializes in providing support for investment and fiduciary services, as well as relationship management for high-net-worth families and individuals.

Prior to her role at Private Wealth, Leslie began her career in 1994 as a trust associate at Northwest Bank (formerly Victoria Bank & Trust) in Victoria, Texas. In 1998, she joined Wells Fargo, where she served as a wealth management client associate.

Leslie enjoys cooking, traveling and country music. She has two sons and one beautiful granddaughter, Nora, who lights up her life.

YEARS OF EXPERIENCE

- 31 years

DESIGNATIONS/CERTIFICATIONS/CLASSES

- Cannon Trust School 1 & 2
- Wealth Investment Management Catalyst Program 2021

COMMUNITY INVOLVEMENT

- Junior League of San Antonio - Class of 1993-1994
- The Junior League of Victoria, Texas, Inc. - Class of 1994-1998; Former Board Member
- Victoria Fine Arts Association - Former Board Member

Investment Advisory Services offered through Private Wealth Asset Management, LLC.



CONTACT

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Wendy Brekken, J.D.

PRESIDENT, CHIEF WEALTH PLANNING OFFICER

As the Chief Wealth Planning Officer, Wendy leads the strategic direction and delivery of comprehensive wealth planning services to high-net-worth individuals and families. She lends her experience and expertise in guiding clients through complex and often emotional decisions, facilitating family meetings, and navigating challenging family dynamics. She has extensive experience in the areas of estate and wealth transfer planning, business succession planning, lifestyle endowment and philanthropy.

As a President and a member of the Executive Committee, she works closely with the rest of the Private Wealth leadership team to set the vision and execute on the strategic direction for the firm. Wendy manages key relationships and initiatives, including partnering with outside counsel on our legal and compliance matters, as well as leading the compensation and human resources committees for Private Wealth.

Wendy serves as a Trustee on the Foundation Board for Metro State University and serves as chair of the Governance Committee. When away from the office, Wendy enjoys spending time with family and friends, reading, traveling, and engaging in outdoor activities (even during Minnesota winters). She and her husband have three children, along with a mini-Australian Labradoodle.

YEARS OF EXPERIENCE

- 20+ years

EDUCATIONAL BACKGROUND

- Creighton University, Heider School of Business, Graduate Certificate, Financial Psychology & Behavioral Finance
- William Mitchell College of Law, JD, Magna Cum Laude
- Saint Olaf College, BA, Psychology and Family Studies, Magna Cum Laude

DESIGNATIONS/CERTIFICATIONS/CLASSES

- Juris Doctor (J.D.)

Investment Advisory Services offered through Private Wealth Asset Management, LLC.



Kim Cappellano

CEO, FOUNDING PARTNER, PHILANTHROPIC SPECIALIST

A founding partner of Private Wealth Asset Management, Kim has over 20 years of financial planning and wealth management experience. She excels in philanthropic services for nonprofits and private family foundations and brings trust and estate management expertise to individuals and families.

As CEO of Private Wealth Asset Management, she partners with the leadership team to set the vision of our firm, in addition to the short- and long-term strategy. She oversees all areas of the company: finance, operations, human resources, marketing, investments, compliance, etc.

Outside of work, Kim enjoys cooking, reading and playing board games. She and her husband have four children, along with two rescue dogs: a German Shepherd and a German Shepherd mix.

CONTACT

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YEARS OF EXPERIENCE

- 25+ years

EDUCATIONAL BACKGROUND

- University of Notre Dame, MNA
- Creighton University, MBA focused on Quantitative Analysis
- Indiana University, BS, Business Administration and Management
- AA, Financial Planning

DESIGNATIONS/ CERTIFICATIONS/CLASSES

- Certified Trust and Fiduciary Advisor (CTFA®)
- Yale University – Women's Executive Leadership Program
- Graduate, Wells Fargo Business Succession Planning I & II
- Graduate, Wells Fargo Family Dynamics Training

COMMUNITY INVOLVEMENT

- Methodist Foundation Board - Board Member
- SHARE Omaha - Board Member & Treasurer
- Child Saving Institute - Former Board Member
- Women's Fund of Omaha - Former Board Member & Treasurer
- Notre Dame Club of Omaha - Former Board Member & Secretary
- Conceive Nebraska - Former Board Member & Vice Chair

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