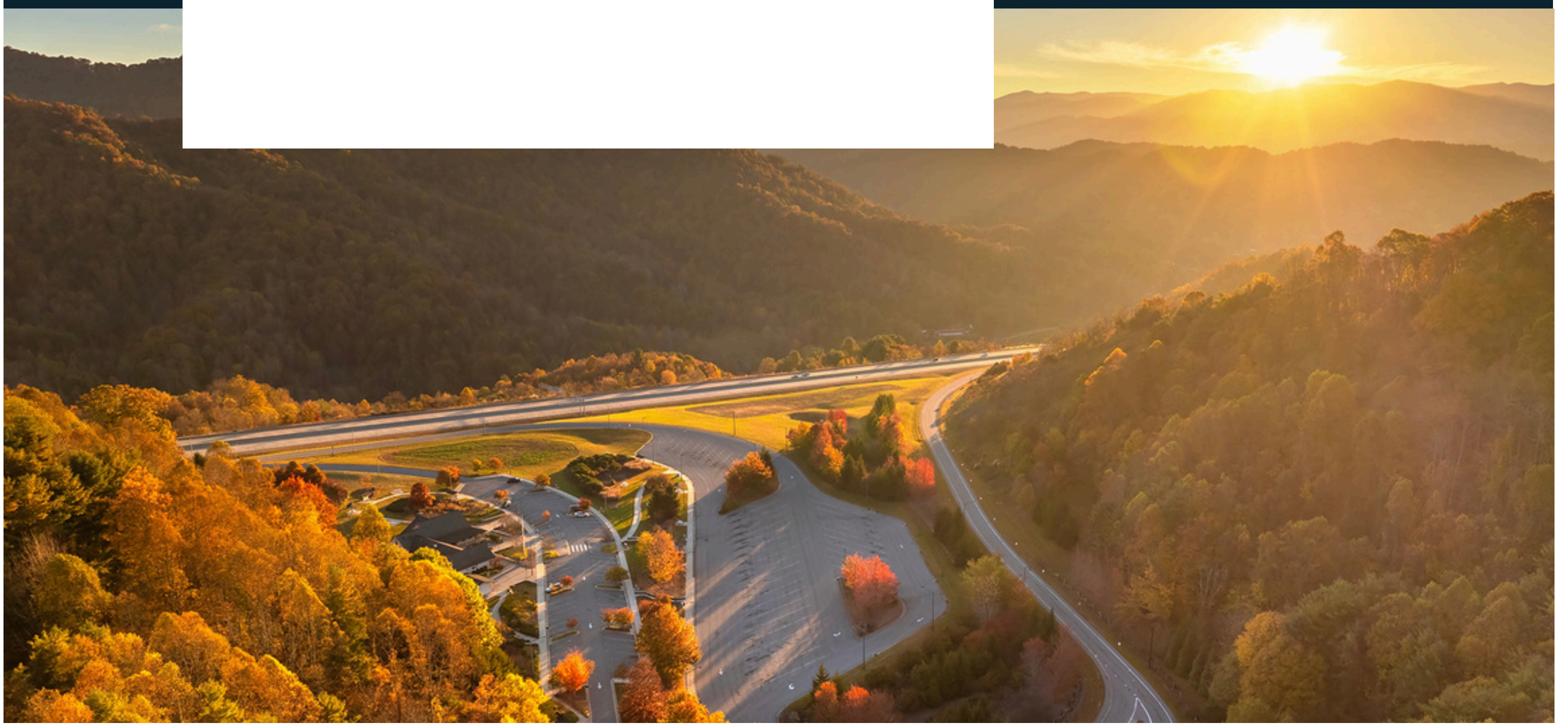
FINANCIAL SYMMETRY

ENHANCE TODAY | ENRICH TOMORROW

Annual Report

2025

2025 Year in Review



Financial Symmetry continued to grow in 2025 while staying rooted in the values that have guided our firm for nearly 25 years.

This year, we welcomed new team members, celebrated professional achievements, and continued expanding the ways we serve clients and their families. As we approach our 25th anniversary, we remain deeply grateful for the trust our clients place in us and the dedication of the team members who make our work possible every day.

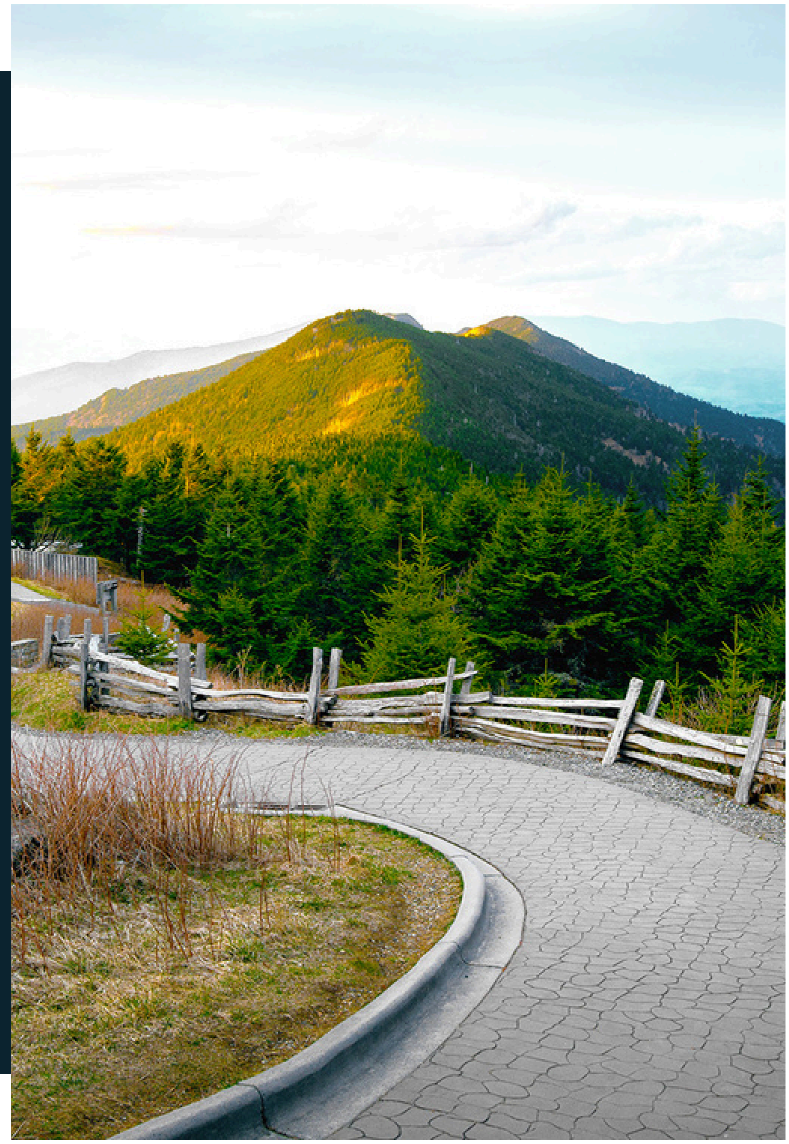
Our growth has been driven by a commitment to developing talent internally, maintaining exceptional client service, and building long-term relationships that span generations.

Client Relationships & Reach

Client retention continues to remain strong at **approximately 98–99% year over year.**

We now serve clients across **29 states.**

Many of our relationships span **multiple generations of families**, reflecting the trust built over decades.



Our client relationships remain the foundation of everything we do.

In addition to investment accounts, we support clients across **115+ custodians and retirement plan providers**, helping manage a wide variety of financial situations and goals.

Milestones With Our Clients

Beyond numbers, our work is about helping people navigate meaningful life moments.

In 2025, we supported clients through:

10	8	5
Retirements	**Home Purchases**	**New Babies**

We also helped families through difficult transitions, including the loss of loved ones, and celebrated meaningful personal milestones and achievements.

We were especially inspired by clients pursuing long-awaited goals — from international travel to extended road trips across the country.

2025
By the Numbers

100

New Clients

883

Total Clients Served

$140M

Net New Assets Under Our Care

~470

Tax Returns Prepared

Our Team

One of the things we are most proud of is the way our team grows with the firm.

Many of our team members began their careers here as interns and have grown into leadership roles over time.

This shared commitment to professional development ensures our clients receive thoughtful, knowledgeable guidance at every stage of their financial journey.

Today:

52% of our team members started as interns

100% of Client Service Associates hold the FPQP® designation

100% of Advisors hold the CFP® designation

Team Growth in 2025

We were excited to welcome several new team members this year:

- **Will Rathburn** joined the team full-time in January.
- **Abby Hinson** and **Avery Wade** joined full-time in summer 2025.
- **Johnny Deem** joined the tax team in December.

These additions strengthen our ability to support clients through tax planning, portfolio management, and financial planning.

Looking Ahead

While many firms in the industry are merging, being acquired, or changing ownership, Financial Symmetry remains committed to growing intentionally and staying independent.

As we approach **Financial Symmetry's 25th anniversary**, we remain focused on the same mission that has guided us from the beginning:

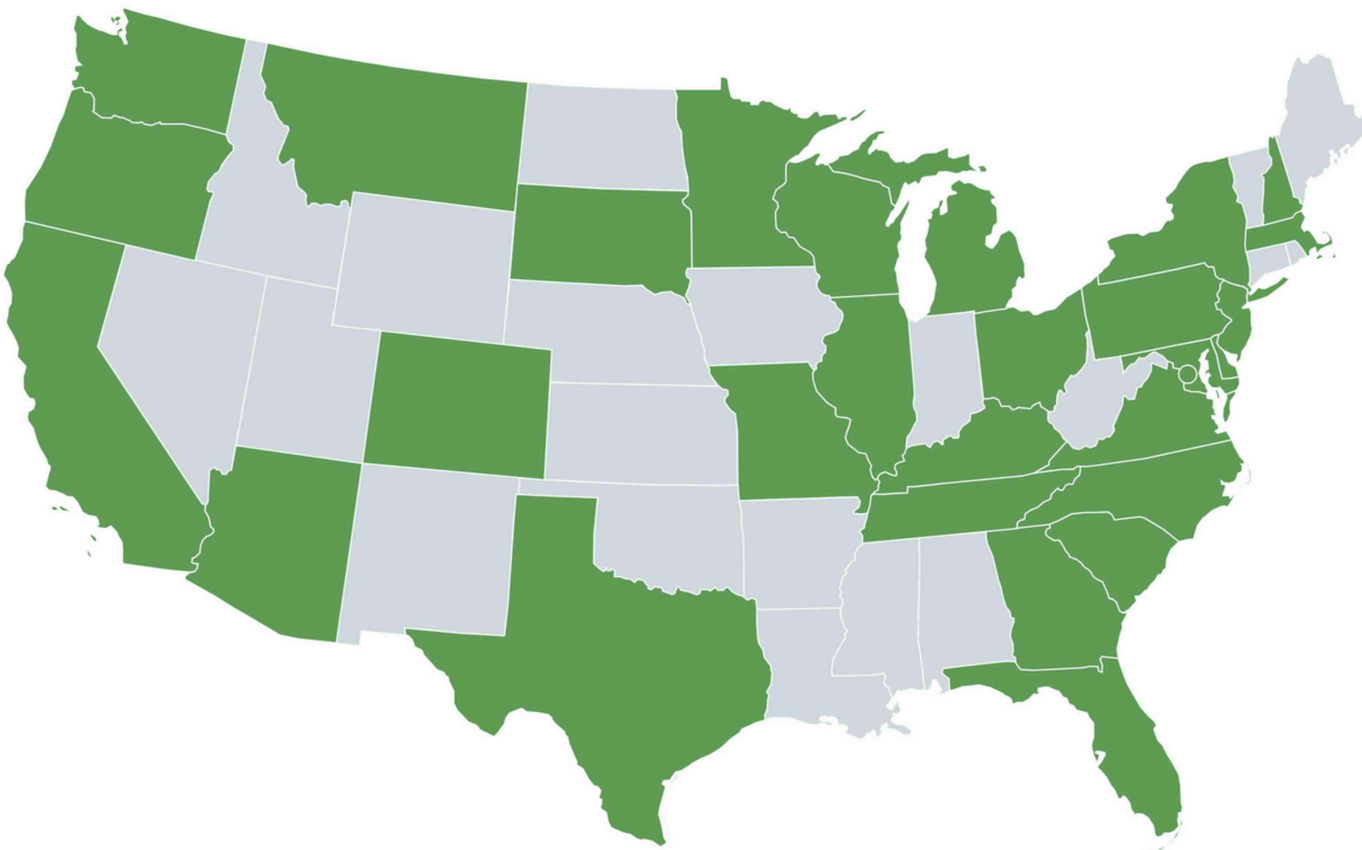
Enhance Today.

Enrich Tomorrow.

Our team continues to invest in professional development, deepen client relationships, and expand the ways we serve families across the country.

We are grateful for the continued opportunity to do meaningful work with our clients and communities.

Locally Based, Nationally Trusted

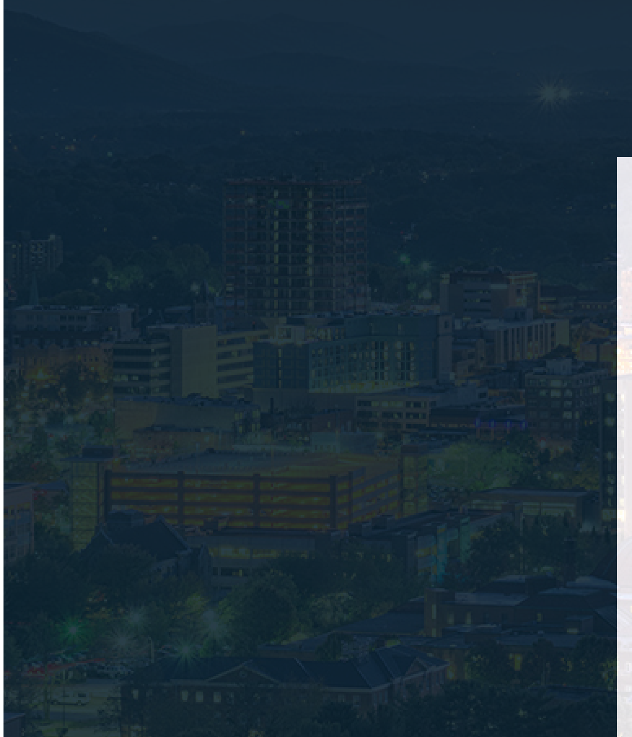


Thanks to our growing online presence, clients moving across the country, and your referrals of family and friends, we have clients across the country.

Thank You!

We appreciate the opportunity to serve you.

If you would be interested in seeing anything else in our future annual reports, please let us know.



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