

A Letter from the Founder

Their dreams. Our mission.

PRINCIPLE ONE

Youthful Bliss

I've been in this industry for many years, and if there's one truth I've come to believe, it's that experience isn't measured in years — it's measured in effort, curiosity, and consistency.

Experience comes from how many clients you've sat across from, how many hours you've dedicated to learning, and how committed you are to never stopping that process.

Here's something I've found fascinating: a 30-year-old advisor who spends 12 hours a day studying and refining their craft will know three times as much as a 60-year-old who has spent just one hour a day doing the same. By the time that 30-year-old reaches 60, they'll know twelve times more than their predecessor ever did.

I call this concept compound knowledge — and the beauty of it is that you are the one who benefits.

This is the foundation of Fiducia. We believe clients value something they may not even consciously recognize — the **energy, discipline, and depth of understanding** that comes from **youthful, driven, and intellectually curious advisors**.

That combination of passion and perspective is what powers your financial future. We call this principle **Youthful Bliss**.

PRINCIPLE TWO

The Whole Nine Yards

Over the years, I've asked hundreds of clients a simple question:

“What are your expectations when working with a financial advisor? Half don't have any expectations.

The other half say things like, “I want someone who answers the phone, meets with me regularly, brings fresh ideas, and tells me the truth.”

All wonderful things — but none of them directly impact your wealth.

The reality is, most clients don't know what material expectations are reasonable to have. So when people ask me, “Tyler, what tangible expectations should I have?”

My answer is always the same: **all of them.**

That belief is one of the main reasons Fiducia was founded.

A true financial advisor shouldn't just manage your investments. They should manage your **entire financial life.** You shouldn't have to juggle between an accountant for taxes, an attorney for estate planning, and an insurance specialist for protection.

Your advisor should have a team that can do it **all** — **seamlessly, in-house, and without adding hidden costs or extra fees.**

This isn't too good to be true. It's what should have been true all along.

When you start expecting comprehensive service, you naturally weed out those who can't deliver. The ones left standing — those are the professionals you want in your corner.

We call this **The Whole Nine Yards.**

PRINCIPLE THREE

Vantage Point

And then, there's **transparency.**

Have you ever left a meeting wondering how your advisor gets paid? Or what their incentives really are? Or why a particular product or strategy was recommended?

You'll never leave a meeting at Fiducia asking those questions.

This was another driving force behind our founding — **no commissions, no hidden incentives, no corporate agendas.** Just clarity, honesty, and alignment.



<p>Youthful Bliss</p> <p>Energy, discipline, and intellectual curiosity in service of your future.</p>	<p>The Whole Nine Yards</p> <p>Comprehensive planning that coordinates your full financial life.</p>	<p>Vantage Point</p> <p>Transparent advice without commissions, hidden incentives, or agendas.</p>
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FIDUCIA'S VISION

Can you see it?

After nearly a decade in this profession, I've learned that these three principles — **Youthful Bliss, The Whole Nine Yards**, and **Vantage Point** — are what truly matter when finding the right financial advisor.

At Fiducia, we've built a firm designed around those values — one that believes clients deserve youthful energy, comprehensive service, and absolute transparency.

When you find the right team living by those principles, you gain more than financial guidance — you gain the freedom to focus on what truly matters. To build, to create, to innovate, to change the world.

That's **Fiducia's Vision**.

Can you see it?

If so, connect with us, and let's bring that vision forward — together.

With gratitude,

Tyler Keenan

Founder, Fiducia