Welcome

to Strong Valley

STRONG VALLEY

WEALTH & PENSION

STRONG VALLEY
WEALTH & PENSION

THE STORY BEHIND OUR LOGO

THE VALLEY PERSPECTIVE

Physical mountains often define the natural boundary of a valley. The Strong Valley logo is drawn from the perspective of fields in the foreground and mountains in the distance. This mirrors Strong Valley's belief that making the right near-term decisions derives from clarity about long-term goals.

THE MOUNTAINS

The blue color of mountains signifies trust, dependability and strength which are also reinforced through the mountain shape itself. Triangular peaks help to emphasize the characteristics of stability, professionalism, strength and efficiency.

The mountains are also representative of nearby Yosemite National Park. Which, beyond its regional location, Yosemite, along with other national parks, symbolize how commitment to preservation enables an enduring legacy for generations to come. Collectively these ideas represent Strong Valley's goal of supporting clients in their wealth preservation and in leaving their own legacy. The imagery also serves as a reminder that our decisions today shape our future – not just our own, but for those who come after us.

THE OPEN CIRCLE

Orange is used to express traits such as friendliness, sociability, and confidence. Just as mountains help define physical valleys, the orange circle sets distinct boundaries that encompass Strong Valley's ideals, which set them apart from others. Yet, like the open circle, Strong Valley is welcoming to all who share our ideals and goals.

THE FIELDS

Green symbolizes ideas of freshness, growth, and nature. The smooth rolling hills and crop rows are a nod to the vast agribusiness culture in the Central Valley and home to Strong Valley's Fresno, CA headquarters.

The fields also carry a deeper meaning. Known for their hard work and resilience, during planting, cultivating, growing, and harvesting, farmers must be prepared for unexpected storms, shifting seasons, and sudden changes in market prices. Like you, they must be prepared for many things outside of their control.

Strong Valley largely serves individuals, families, and businesses whose wealth has come through hard work. Our goal is to help our clients plan for the unexpected, while preserving the fruits of their labor, regardless of where they are on their journey or life cycle.

THE ROUND DESIGN

Circles may be used to signify relationships, continuity, and endurance. The overall circle shape of its logo symbolizes Strong Valley's commitment to long-term relationships with our clients and community partners.

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Strong Valley Is Not Just A Place, But An Ideal.

Strong Valley is headquartered in Fresno, in the heart of California's Central Valley, near the geographical center of the state itself. Fresno is centrally located between San Francisco and Los Angeles, less than 80 miles from three major national parks (Yosemite, Sequoia, and Kings Canyon) and only a short distance from the beautiful California coast.

The ideals of Strong Valley transcend geography. Coordinates do not define our borders; a diverse group of clients and networks of professionals in many different locations do. We are a community of people committed to shared values and guiding principles, principles that shape not only how we conduct business, but why we are in business, and those we serve.

In 2000 the National Civic League named Fresno, the only city in California, as an All-American City. This prestigious award annually selects just ten cities across the nation as "models of problem-solving and community-building" and "the potential within every community to tackle tough issues and create real change." Strong Valley carries with it these ideals and sentiments.

A Journey Guided By Core Principles.

Strong Valley is on a journey to change how personal and business wealth management is done. We are committed to innovation that focuses on the client experience in every aspect of our business and adhere to proven principles, well-defined laws, and safeguards. We embrace an attitude of continual learning, with the implementation of the latest tools and technology to serve our clients better. This is not creating change for its own sake; instead, it is transforming intentionally to create a real and meaningful difference in our clients' lives.

- **We believe** making the right near-term decisions comes from clarifying long-term goals and measurable outcomes.
- **We believe** integrity, transparency, and excellent service should guide every aspect of a client's journey and experience.
- **We believe** long-lasting relationships are built on a foundation of trust and forged over time by walking in-step and shoulder-to-shoulder with our clients.
- **We believe** that service is about serving others – it goes beyond regular business; it means doing things that have meaning and purpose while inspiring others to do the same.
- **We believe** that these enduring values and principles, when executed to their fullest potential, will lead to growth, strength, security, and a lasting legacy – not only in business but in life.

Welcome to Strong Valley – We're Glad You're Here.

We created Strong Valley to build a community of clients and a network of partners devoted to building on the foundation of these enduring philosophies.

[i] Past Winners - National Civic League. (2017). Retrieved January 20, 2020, from National Civic League website: https://www.nationalcivicleague.org/america-city-award/past-winners/

[ii] The All-America City Award - National Civic League. (2019). Retrieved January 20, 2020, from National Civic League website: https://www.nationalcivicleague.org/america-city-award/

Meeting Your Critical Wealth Management Needs

Private Wealth Management

Comprehensive Wealth and Asset Management
Gain greater peace-of-mind by crafting a clear long-term vision and solution for every aspect of your financial life – freeing you to focus on living life to the fullest today, and free from worry about tomorrow.

Personalized Financial Planning and Tools
Strong Valley advisors can provide you with information, resources, and tools to prioritize spending, evaluate changing risk tolerance, identify opportunities for additional savings, and explore various financial strategies.

Investment Tax Strategies
Ensure your investments are as tax efficient as possible. Strong Valley will work to consolidate your tax reporting forms and help optimize your retirement plan options.

Estate and Trust Services
Strong Valley advisors and our network of professionals will work with you side-by-side to select strategies that both transfer and preserve your financial assets while minimizing tax liability.

Retirement Planning
Every client's retirements goals are different. Some want to travel the world, invest more time with hobbies, spend more time with their family, give back to their community or specific causes, or perhaps even start a second career. Whatever your retirement goals, Strong Valley is committed to helping you achieve them.

Saving for Education
Strong Valley can provide advice and assistance when it comes to saving for a loved-one's education. We will research opportunities and help you understand various college financial aid programs. We will provide you with detailed information and strategies that are right for your specific situation.

Business Services

Owner and Employee Benefits
Strong Valley Wealth & Pension helps businesses establish qualified retirement plans that are flexible, sustainable, and that maximize benefits for both but there are many factors to consider when implementing and/or managing employee benefits – especially retirement benefits.

Cash and Working Capital Management
By reviewing business performance and projections, Strong Valley also helps determine an appropriate level of liquidity ensuring that your business has funds to weather emergencies or pursue new opportunities.

Exit Strategy and Succession Planning
Whether you plan to retire as an owner or sell your business, Strong Valley and its team of partners are ready to help through every stage of your business life. With decades of business experience Strong Valley brings a wealth of experience that can help you implement a clear and solid plan for succession.

Reinsurance Contracts
Even successful businesses can be put at significant risk if the business is unable to withstand the financial strains of unexpected major events or large payouts. Get peace of mind and reduce the financial risk to yourself, your business, the employees, and the customers who depend on you.

OUR ***WHY*** WE DO WHAT WE DO

SHAPES ***HOW*** WE DO BUSINESS

AND DRIVES ***WHAT*** WE FOCUS ON

We are committed to building strong relationships, delivering strong performance, providing a strong network, and growing a strong community for our clients.

Independent Advice

Individually Focused

Community Driven

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Keys to a Successful Relationship

As professional advisors we believe that a core component of your achieving your financial goals comes through ensuring a successful working relationship. And we believe that a successful working relationship comes from mutual trust, respect, and sincerity.

What We Can Expect From Each Other

Our advice is custom tailored to the information you provide – so keeping us informed and involved with all financial considerations or goal changes will be important to providing the proper advice.

Likewise, we promise to keep you informed of changes that may impact necessary strategies and will meet with you regularly to review your investment plans and goals.
We believe the best relationships are based on mutual effort, so we also expect the same things you expect from Strong Valley:

- Trust
- Respect
- Sincerity
- Integrity
- Responsiveness to Requests
- Commitment to Relationship
- Honesty and Full Disclosure

Strong Valley represents community and commitment. We are a community of professional advisors dedicated to the success of our clients, measured in both financial strength and the strength of our relationships.

We believe that when you genuinely care about people your motivation goes beyond just looking out for their best interests, it means ensuring that clients realize the tangible financial benefits of our being there for them every step of the way.

STRONG VALLEY
WEALTH & PENSION

OUR TEAM

Chris Conner
Founding Principal
CEPA®, CFP®

Adam Tirapelle
Founding Principal
MBA, CIMA®

Jason Rankin
Managing Principal
CFP®

Kyle Trippel
Managing Principal
CRPS®

Rick Trippel
Senior Wealth Manager

Erick Conway
Senior Wealth Manager, CFP®

Erica York
Senior Operations Associate

Cindy Florez
Senior Client Associate

Shirley Huff
Senior Client Associate

Irene Rankin
Client Associate

CERTIFIED EXPERTISE IN:

- **Comprehensive Wealth Management**
  - Financial Planning
  - Investment Policy
  - Asset Allocation
  - Risk Management
  - Generational Wealth Transfer
- **Corporate Retirement Plans**
  - 401k/Profit Sharing
  - Defined Benefit/Cash Balance
  - ESOP

Chris Conner
Founding Principal
CEPA®, CFP®

For over 22 years Chris has helped clients address their financial concerns and develop sound strategies by focusing on each individual's specific needs. With extensive experience throughout major shifts in the markets, he has dedicated a career to delivering the personalized investment planning services that clients and their families have earned. Chris works with families and small to mid-sized businesses to provide integrated wealth management and planning services.

Chris holds the Series 7 and Series 66 registrations as well as the Certified Financial Planner® (CFP®) designation — identifying to the public that he has been authorized to use the CFP® certification marks, has met rigorous professional standards, and has agreed to adhere to the principles of integrity, objectivity, competence, fairness, confidentiality, professionalism and diligence when dealing with clients.

Chris earned a Bachelor's degree from San Diego State University with a major in Economics and a minor in Business Finance, as well as a Certificate in Personal Financial Planning. He is married with three busy children and resides in Clovis, and is very active with the kids' school and sports activities.

Adam Tirapelle
Founding Principal
MBA, CIMA®

For over 16 years, Adam has provided financial services and private wealth management advice, excelling in financial modeling, portfolio construction, and risk management. He holds Series 7, Series 63 and Series 65 registrations as well as the prestigious CIMA® designation. Fewer than 2% of financial services professionals hold CIMA® certification, which is delivered by Investments & Wealth Institute™ and is the only credential designed specifically for investment advisors and consultants.

Prior to founding Strong Valley Wealth & Pension, Adam was a Vice President of Investments in the Private Client Group of Wells Fargo Advisors. Before beginning his career in the securities industry, Adam provided middle-market mergers and acquisitions services and succession planning to small and mid-sized businesses. He is a graduate of the University of Illinois at Urbana-Champaign with both a bachelor's degree and an M.B.A. in Finance. Adam was a standout collegiate wrestler earning three All-American honors and an NCAA National Championship in 2001.

Adam currently lives in Clovis with his wife and three children. He continues to stay deeply involved in the local community through scholastic sports by coaching and mentoring 6th through 12th-grade student-athletes.

Jason Rankin
Managing Principal
CFP®

Jason Rankin is a graduate of California State University, Fresno. Prior to Strong Valley Wealth and Pension, he joined his father in 2004 where they formed The Rankin Wealth Management Group of Wells Fargo Advisors.

He prides himself on the art of long term investment planning for the clients. He enjoys incorporating a service he calls life planning. This is an area of advising to ensure clients are on track to reach their life's goals as opposed to finding the next hot stock. This interactive approach can help the group's clients identify what their investment priorities are in light of current conditions and then help them make adjustments in the future as their life and the markets change.

Jason is a wealth manager and portfolio analyst for the team. In this capacity, he works with fund company analysts and various independent research sources to analyze, select and allocate investments in custom-designed portfolios. He is responsible for the management and monitoring of client investment portfolios. He works with clients to establish and implement their financial strategies, and in the ongoing review of their investment portfolios.

He holds a CERTIFIED FINANCIAL PLANNER™ designation and has securities registrations Series 7 and 63, and a California Insurance License, number 0E87236.

Jason has grown up in Fresno and enjoys an active lifestyle and pursues regular exercise through CrossFit. He also enjoys traveling with his wife Kailyn and their two boys, Dane and Decker.

Kyle Trippel
Managing Principal
CRPS®

As a Strong Valley Managing Partner, Financial Advisor and Portfolio Analyst, I provide detailed personal financial planning that prioritizes spending, identifies opportunities for additional savings, evaluates tax strategies, factors in the effects of inflation, and protects you from potential financial pitfalls.

Ways I Help Individuals and Families:
- Personalized Financial Planning
- Investment Tax Strategies
- Estate and Trust Services
- Retirement Planning
- Saving for Education

In addition, as a Chartered Retirement Plan Specialist (CRPS®) I have extensive experience consulting with organizations to implement, execute, and administer well-structured retirement plans.

What Sets Strong Valley Apart
We believe a client-advisor relationship is more than just a good financial fit. It's about connecting on a personal level and building mutual trust over time. It's about integrity, objective advice, and unwavering concern for the well-being of our clients. That's our goal with each and every client. These are values shared by the entire Strong Valley team.

Prior to Strong Valley:
- 2009 to 2021
  Wells Fargo, leaving as the Senior Vice President of Investments.
- 2015 to 2021
  Every year recognized as a Premier Advisor, continuously exceeding the Well Fargo Advisors' measurement standards for business growth, completion of educational components, and professionalism.

Born and raised in Fresno, I value direct involvement with the local community. I am a member of the New Covenant Community Church, and Ducks Unlimited at both the local and state levels. I devote time to helping kids in the community by coaching a variety of sports teams and serve on the Board of Directors for River Park Little League. I serve as chairman of the Board of Directors for Fresno/Madera Youth for Christ, sit on the Finance Committee for New Covenant Community Church, sat on the state Board of Directors for Ducks Unlimited, and past board member for the Kiwanis Club of East Fresno.

My wife Shannon and I have two wonderful boys, Tanner and Hunter. I enjoy spending time with my family and getting outdoors for hunting, fishing, and coaching my two boys.

We Serve:
- Individuals and Families
- Company Executives
- Medical Industry Professionals
- Educators and Administrators
- Retirees and Prospective Retirees
- Professional Service Providers
- Entrepreneurs
- Self-Employed Professionals and more

Our Business Clientele includes:
- Accounting and CPA Firms
- Agribusiness Organizations
- Legal Firms and Solo Practitioners
- Manufacturers and Product Developers
- Medical Groups and Private Practices

Rick Trippel
Senior Wealth Manager

Rick Trippel joined Strong Valley Wealth and Pension as a Senior Wealth Manager, the culmination of over 35 years in the financial services industry, with a career dedicated to placing clients' needs above large corporate interests. Strong Valley enables Rick to continue in his commitment to maintaining quality client relationships with more face-to-face meetings, access to better technology, and being able to deliver truly independent advice.

Strong Valley also reflects Rick's own desire to be easily accessible to clients, and his drive for daily accountability in upholding the values of trust and integrity, and a commitment to making a meaningful difference in the lives of his clients. These are the values Rick has worked to bring during his 35+ years of listening to client needs, and managing assets for individuals, corporations, corporate retirement plans, endowments, and foundations.

Rick started his career in 1986 when he became registered and joined Shearson Lehman Brothers. In 1998, Rick achieved his Certified Investment Management Analyst (CIMA®) designation from the Wharton School, University of Pennsylvania. Rick graduated from California State University, Fresno with a Bachelor of Science in Business Administration in 1977.

Having lived in Fresno his entire life, Rick feels fortunate to have made many good friends in the San Joaquin Valley. Rick is a past Board member of Fresno/Madera Youth for Christ, a past deacon of the board for New Covenant Community Church in Fresno, and a past president for Fort Washington Golf & Country Club. He and his wife Jeannie have two children and 5 grandchildren. In his spare time, he enjoys spending time with his grandkids, traveling, and enjoying the outdoors hunting, fishing, and golfing.

Erick Conway
Senior Wealth Manager
CFP®

Erick is a United States Marine Corps veteran, a graduate of Pepperdine University with a Bachelor of Science in Management, and a Certified Financial Planner™ with over a decade of experience helping clients navigate important financial decisions.

One of Erick's core values is striving to ensure clients make good financial decisions and understand the "why" behind those decisions. He simplifies market principles, explains their impact on each client's situation, and presents clear options for moving forward. Erick's goal is to ensure clients have a clear understanding of their financial roadmap and confidence during natural market changes and conditions.

Another important aspect of working with Erick is his commitment to transparency, maintaining a high level of responsiveness to client communications, and developing meaningful long-term relationships with clients. These shared values are some of the many reasons Erick decided to join the Strong Valley team in 2024.

Erick and the Strong Valley team believe deep client relationships aim to assist clients in achieving their goals. One of the most rewarding things to Erick is seeing clients fulfill their retirement and financial goals.

Erick is an active member of the Financial Planning Association and enjoys playing golf and beach volleyball in his spare time. He resides in San Diego, California, with his wife, Jami, and dogs, Moo and Tater.

Shirley Huff
Senior Client Associate

Shirley Huff joined Strong Valley in 2021 with over 25 years in the financial industry, and over 10 years as a client associate. Shirley reflects the core values of Strong Valley including a commitment to upholding the highest degree of integrity and ethical standards when serving clients.

Shirley is driven to meet client needs by building positive relationships, genuine care, and working hard to be readily available regardless of circumstance. Her motto is, "If there's a will there's a way" and prides herself on accomplishing client financial needs no matter how simple or complex a situation may be.

Shirley is motivated when clients know they are not just a number or an account and feel like they are being heard by a friend who will stand by their side through thick and thin. Many people work very hard to build a successful financial future and Shirley wants them to have peace of mind all along the way.

Shirley is married and has three grown children. In her spare time, she enjoys spending as much time as she can with her Grandchildren and cooking for family and friends. Along with her family, she volunteers in her local bible ministry. Shirley also enjoys traveling to shop, relax, and explore new places.

CFP® Certified Financial Planner

CFP® Board Certification **The Standard of Excellence**

Financial Education

Today more than ever, CERTIFIED FINANCIAL PLANNER™ professionals are an essential resource. From budgeting, to planning for retirement, to saving for education, to managing your taxes and your insurance coverage, "finances" doesn't mean just one thing for most Americans — and "financial planning" means much more than just investing. Bringing all the pieces of your financial life together is a challenging task.

Although many professionals may call themselves "financial planners," CFP® professionals have completed extensive training and experience requirements and are held to rigorous ethical standards. They understand the complexities of the changing financial climate and know how to make recommendations in your best interest.

(Source: cfp.net November, 2019)

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Private Wealth Management

Comprehensive Wealth and Asset Management
Personalized Financial Planning and Tools
Income Tax Strategies
Estate and Trust Service
Retirement Planning
Saving for Education

Business Services

Owner and Employee Benefits
Cash and Working Capital Management
Exit Strategy and Succession Planning
Reinsurance Contracts

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