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.

STRONG VALLEY
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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, striving to deliver strong performance, providing a strong network, and growing a strong community for our clients.

Independent Advice

Individually Focused

Community Driven

STRONG VALLEY
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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

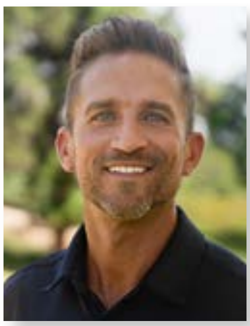
OUR TEAM

Adam Tirapelle
Founding Principal
MBA, CIMA®

Chris Conner
Founding Principal
CEPA®, CFP®

Jason Rankin
Managing Principal
CFP®

Kyle Trippel
Managing Principal
BFA®, CEPA®, CRPS®



Erick Conway
Senior Wealth Manager, CFP®

Cindy Florez
Senior Client Associate

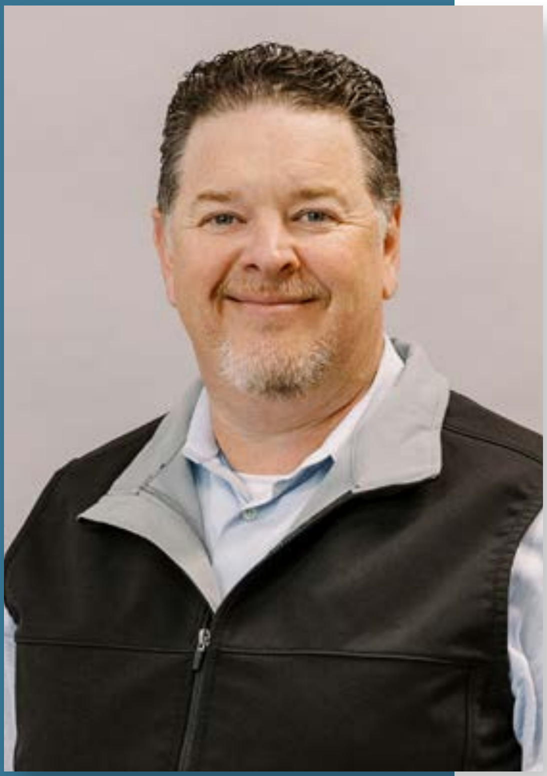
Erica York
Senior Operations Associate

Shirley Huff
Senior Client Associate

Amy Lankford
Client Associate

CERTIFIED EXPERTISE IN:

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

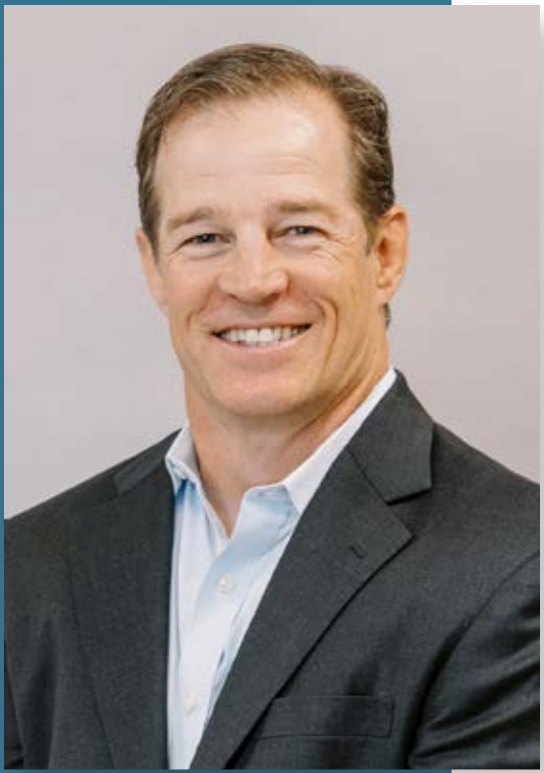


Chris Conner
Founding Principal
CEPA®, CFP®

For over 28 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 66 registration 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®

I didn't set out to be a wealth strategist. My early focus was on one thing: becoming the best wrestler I could be. That mindset took me to the University of Illinois, where I earned an NCAA Division I national title. Wrestling taught me discipline, preparation, and how to perform under pressure — lessons that have guided me ever since.

After my competitive career, I found a new arena where those same skills mattered just as much: helping successful business owners and families navigate complex financial planning. I saw firsthand how hard they were working — creating value, building wealth — and yet giving up far too much to taxes and disjointed advice. I knew I could bring something different.

Today, I lead a wealth management firm focused on helping high-income professionals and entrepreneurs design smart, tax-efficient strategies that align their money with their goals. Whether it's building a defined benefit plan, integrating a captive insurance strategy, or mapping out a business succession plan, I take a hands-on, collaborative approach.

I work closely with CPAs, attorneys, and insurance professionals to build coordinated, custom solutions that solve real problems — not just check boxes. My work is analytical and detailed, but deeply personal. I want clients to feel confident in their plan and clear on their future.

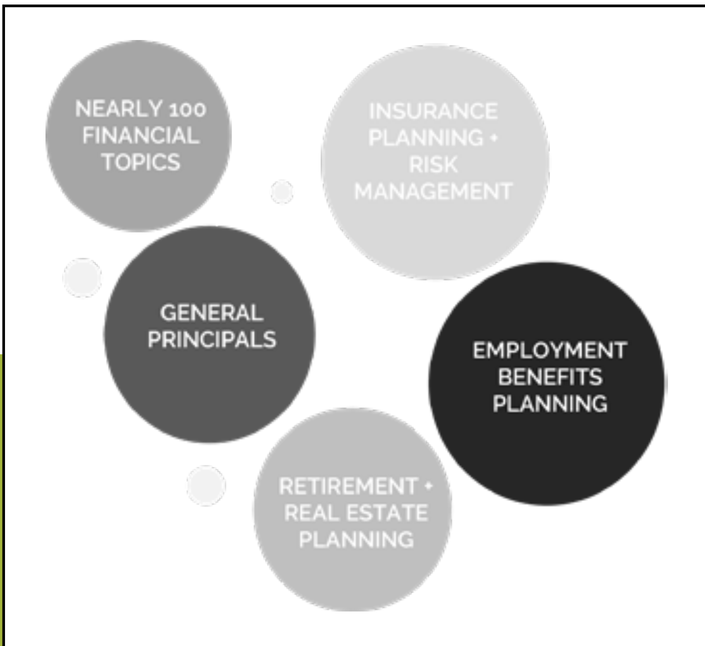
Outside of work, I coach and mentor young wrestlers. It's my way of giving back to a sport that gave me so much — not just a championship, but a mindset and a mission. I'm also a proud husband and father, which keeps me grounded and reminds me what wealth is really for.

I believe that great financial planning blends precision and purpose. If you're building something meaningful — a business, a legacy, a life of impact — I'd love to help you preserve and grow it.

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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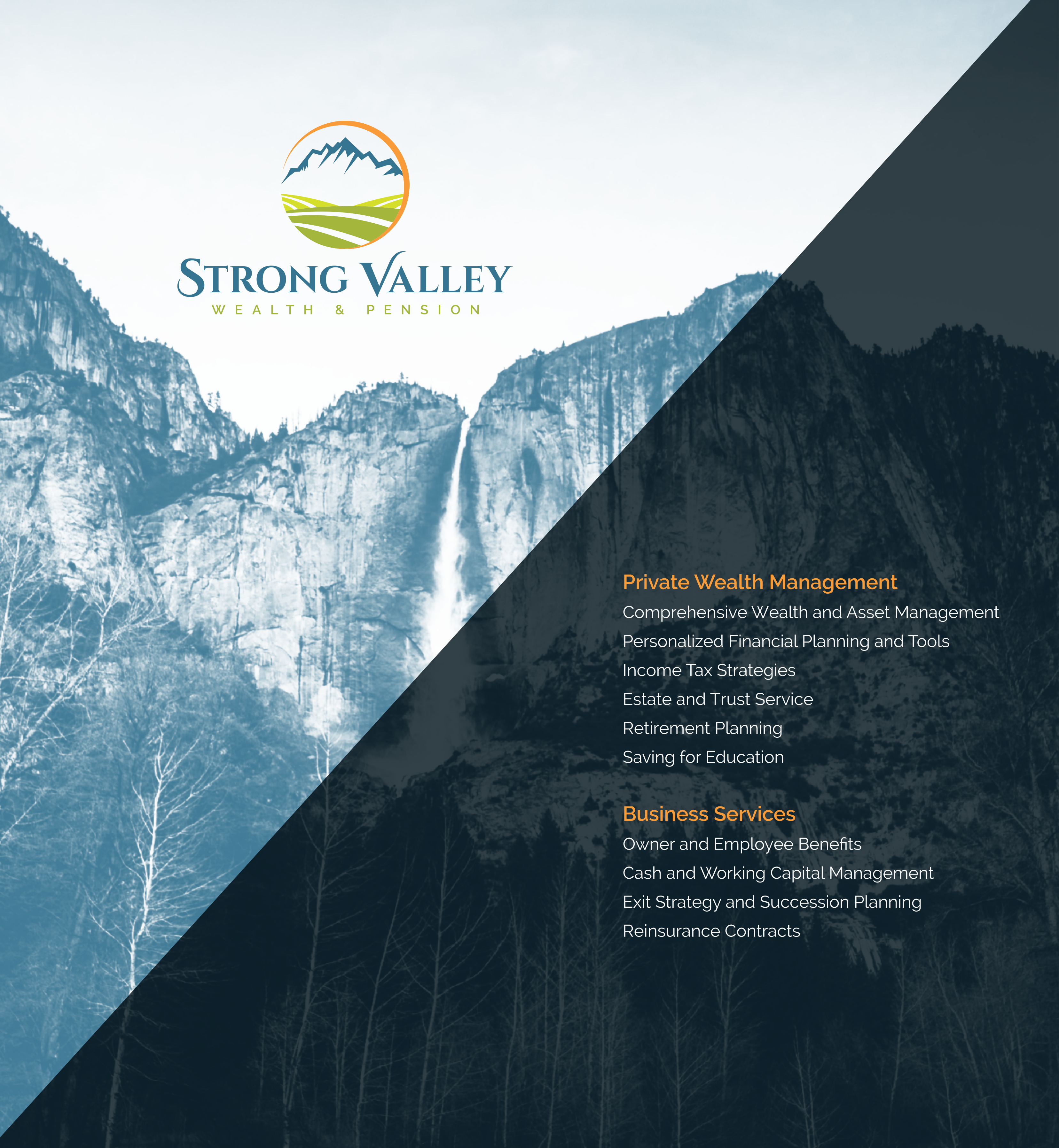

Strong Valley
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Private Wealth Management

- 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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