

NEWS

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Jerad Romo



Victor Garza



Greg Gardner, CFP®

Local Financial Planning Firm Expands

The Gardner Group Adds Two Staff Members

[DALLAS, TX, July 31, 2006] Financial advisory firm The Gardner Group has announced the addition of two new staff members, Victor Garza and Jerad Romo. Victor Garza joined The Gardner Group in the spring of 2006 as Director of Operations to enhance the client service experience and drive the management of the business. Before joining the team, Garza worked as an Associate Financial Advisor for Hollands & Associates, an investment advisory firm in Plano, TX. He received his B.S. in Personal Financial Planning from Texas Tech University, which he attended on full scholarship. While still a student, he served in various leadership roles within the West Texas Financial Planning Association and the Delta Tau Delta fraternal society. Having successfully passed the CERTIFIED FINANCIAL PLANNER™ certification examination in July 2005, Garza needs only to complete his practical experience in order to become certified by the CFP Board to use the CFP® mark of distinction.

As Director of Client Services for The Gardner Group, Jerad Romo provides the connection between financial services, clients and the advisers. Romo received his B.A. degree from Southern Methodist University where he was an award-winning quarterback for the Mustangs. Romo was Offensive MVP for the 2005 Season, a Conference USA Player of the Week and an invited speaker for SMU's Board of Trustee's Dining With Decision Makers and honorary member for SMU's Letterman's Board.

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“As the firm grows and staffing needs increase, the people I hire must share my commitment to excellence,” says Greg Gardner, Founder and President of The Gardner Group. “Victor Garza and Jerad Romo bring that dedication to their positions. I am thrilled to have them as part of my team.”

About The Gardner Group

Greg Gardner, CFP[®], Founder and President of The Gardner Group, Inc. in Dallas, Texas has been serving clients for over 10 years. A fee-only Registered Investment Advisor, Gardner received his B.A. from Southern Methodist University where he was a letterman on the SMU football team. The firm specializes in providing customized financial solutions for high net-worth individuals and their families. Gardner is sought out for his expertise in the design, implementation and administration of comprehensive wealth management plans for affluent families, business owners and charitable institutions.

Gardner was recognized by D Magazine as among The Best Financial Planners in their 2004 ranking. He was also included on Financial Advisor magazine’s list of leading Registered Investment Advisors for 2005. He is Chairman of the SMU Athletics Planned Giving Committee, President of the SMU Mustang Club, and a member of the HPUMC Night OWLS.

Visit www.gardnergrp for more information about Mr. Gardner and his company

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NOTE:

When you need an expert to speak on complicated financial topics in an easy-to-understand and lively way, please call the advisors at The Gardner Group.

~ Thank you!