

# Welcome

to Strong Valley



**STRONG VALLEY**  
WEALTH & PENSION

# STRONG VALLEY

WEALTH & PENSION



## THE STORY BEHIND OUR LOGO

### THE MOUNTAINS

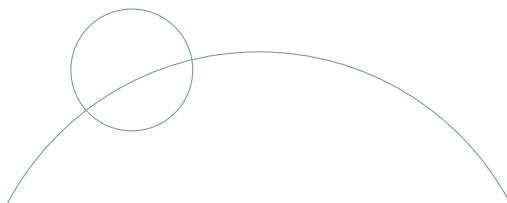
The blue color of mountains signifies trust, dependability and strength which are also reinforced through the mountain shape itself. Triangular peaks help to emphasize the characteristics of stability, professionalism, strength and efficiency.

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 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.



### 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 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.



## 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.

<sup>1</sup> Past Winners - National Civic League. (2017). Retrieved January 20, 2020, from National Civic League website: <https://www.nationalcivicleague.org/america-city-award/past-winners/>

<sup>2</sup> 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 retirement 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.



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# OUR *WHY* WE DO WHAT WE DO

Our Team

## SHAPES *HOW* WE DO BUSINESS

### What You Can Expect From Strong Valley

#### Independent Advice

As a registered investment advisor (RIA) we are free to focus on protecting our clients, putting your interests first – not corporate policies and bureaucracies.

#### Individually Focused

Every person and situation are unique. We take a holistic, qualitative, and quantitative approach to understanding your goals, risk tolerance, time frames, and the complete picture of your financial life.

#### Clear Communications

We will carefully explain any proposed strategies and provide you with the clear insight and control you need to make the best financial decisions possible.

#### Accessibility

Strong Valley provides regular communications via email, mail, and phone. We also make it easy for you to set appointments and send messages 24/7 directly from our website.

#### Respect and Confidentiality

We respect your time and strive to be prompt and prepared for every meeting. We also respect your privacy and protect your confidential information.



**Adam Tirapelle**  
Founding Principal  
MBA, CIMA®



**Chris Conner**  
Founding Principal  
CFP®



**Jason Rankin**  
Managing Principal  
CFP®



**Kyle Trippel**  
Managing Principal  
CRPS®



**Rick Trippel**  
Senior Wealth  
Manager, CIMA®



**Cindy Florez**  
Senior Client  
Associate



**Erica York**  
Senior Operations  
Associate



**Shirley Huff**  
Senior Client  
Associate



**Irene Rankin**  
Client Associate

## AND DRIVES *WHAT* WE FOCUS ON



**Independent  
Advice**



**Individually  
Focused**



**Community  
Driven**

### 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

# 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.



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**Adam Tirapelle**  
Founding Principal  
MBA, CIMA®

Adam Tirapelle has 16 years of experience providing 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.



**Chris Conner**  
Founding Principal  
CFP®

Chris Conner has helped clients address their financial concerns and develop sound strategies for over 22 years 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.





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### **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.





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## Kyle Trippel

Managing Principal  
CRPS®

Kyle enjoys a fulfilling career in Fresno, California, where he was born and raised. He enjoys working with clients that share his philosophy of treating others the way one would want to be treated – with honesty, clarity, and communication that shows empathy and respect for the needs of others.

Kyle Trippel's journey to Managing Principal at Strong Valley is the result of a career dedicated to helping clients achieve their financial goals, giving clients access to better tools, and providing independent advice that helps clients feel peace and clarity in the process.

Kyle chose Strong Valley for the opportunity to work with other professional advisors he has known for a long time. The advisors at Strong Valley appreciate strong work ethics and values and are committed to the local valley and to the broader community of all clients, regardless of location.

Prior to Strong Valley, Kyle worked at Wells Fargo from 2009 to 2021 leaving as the Senior Vice President of Investments. In 2011, he earned his Chartered Retirement Plans Specialist designation from The College of Financial Planning. Every year from 2015 through his departure he earned recognition as a Premier Advisor, continuously exceeding the Well Fargo Advisors' standards of measurement for business growth, completion of educational components, and professionalism.

Kyle started his career as a financial advisor at Smith Barney in 2007. He was drawn into the industry having started as an intern and later working for Nuveen Investments in Santa Barbara, California where he lived and worked for six years. Kyle earned his Bachelor of Arts degree in Economics and Business in 2005, from Westmont College where he was also Captain of the Rugby team.

Today Kyle is devoted to helping the youth in his community by coaching various sports teams and is on the Board of Directors for River Park Little League. Kyle is the treasurer of the Board of Directors for Fresno/Madera Youth for Christ, and former member of the Board of Deacons for New Covenant Community Church where he actively attends. Kyle is an active member and a past member of the state Board of Directors for Ducks Unlimited in the state of California. Kyle is also a past board member for the Kiwanis Club of East Fresno.

He and his wife Shannon have two wonderful boys, Tanner and Hunter. In his spare time, Kyle enjoys spending time with his family, coaching his sons' sports teams, and spending time in the outdoors hunting, fishing, and golfing.





## **Rick Trippel**

Senior Wealth Manager  
CIMA®

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.



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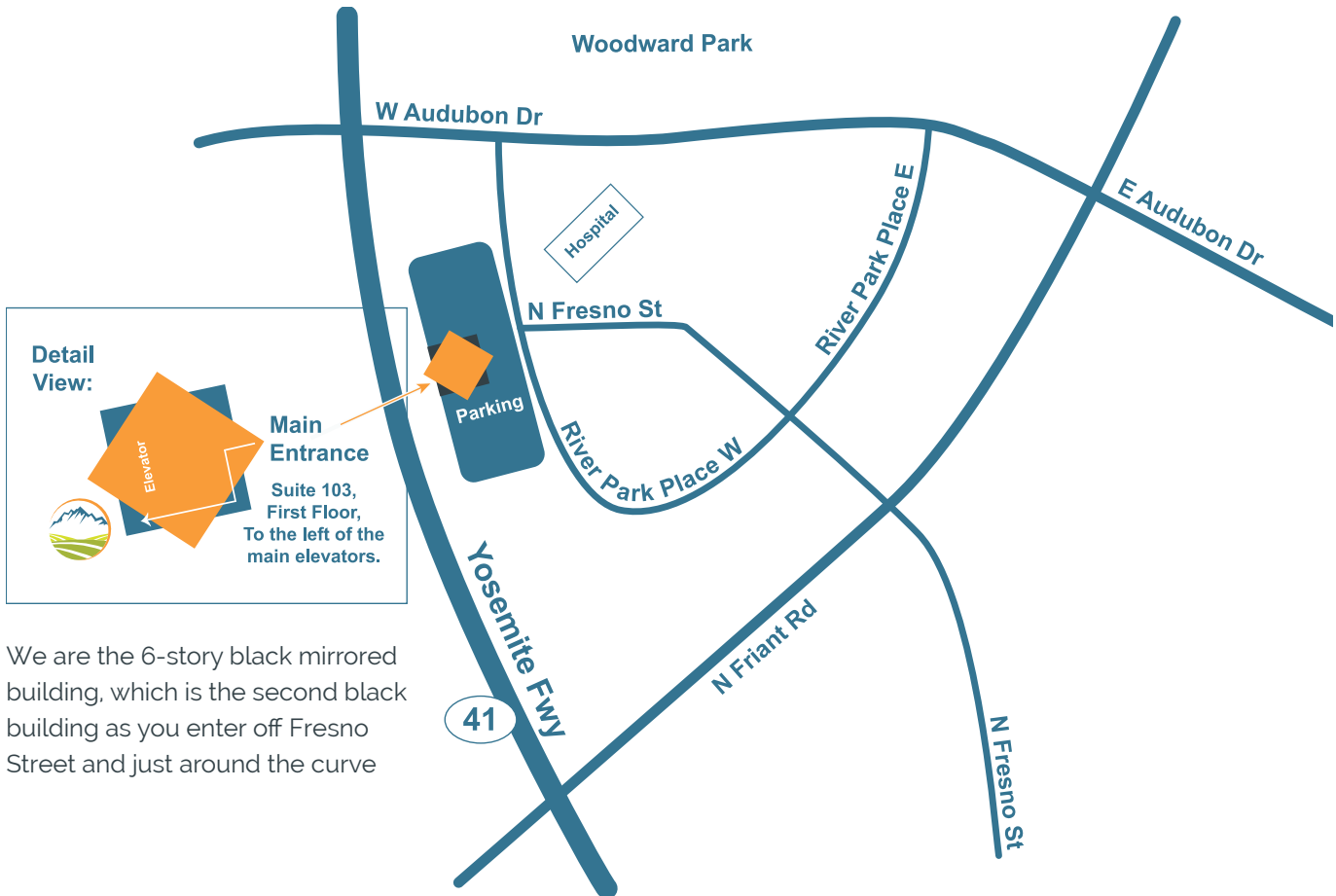


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559-384-2900



We are the 6-story black mirrored building, which is the second black building as you enter off Fresno Street and just around the curve



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