Trammell Cooper, CFP®, CTFA

GENESIS



Wealth Management

create. grow. distribute.



create grow distribute

# WELCOME

Hello!

I am Trammell Cooper, CFP®, CTFA, representing Genesis Wealth Management, and I extend a heartfelt 'thank you' for your interest in my wealth management services. Serving a select group of clients nationwide allows me to offer a personalized experience and an unparalleled level of individual focus that is hard to find elsewhere.

Beyond its monetary significance, your wealth embodies a lifetime of dedication and serves as the bedrock for your future endeavors. When you partner with me, you will gain access to the time and attention essential for pursuing both your financial and life aspirations, seeking to foster a sense of independence, security, and serenity. This empowers you not only to enrich the meaning of your life but also to establish an enduring legacy.

I encourage you to reach out so that we may discuss your current position and future aspirations. I am genuinely excited about the prospect of collaborating with you!

Trammell Cooper, CFP®, CTFA

# OUR CORE VALUES

*We are driven to pursue success for you.*

-Trammell Cooper, CFP®, CTFA

**Extraordinary experience.** We foster a highly personalized relationship with you.

**Competency.** We have extensive experience in complex wealth management issues.

**Clients first.** Every decision we make is based on your goals.

**Integrity.** We uphold the highest standards, placing your interests first.

**Wealth Planning for Life™** We plan to serve your needs for life.

**We are grounded in our core values. Remaining anchored to these is the key to creating a plan to work toward your financial security.**

# My Why

*Relationships mean so much to me. Nurturing strong bonds with family, friends, my community, and you, my client, anchors me in my role as a wealth manager.*



*Trammell & his mom, June Cooper*

Raised in Austin and shaped by years advising senior military officers, executives, and government leaders, I bring discipline and perspective to every financial plan. As a CERTIFIED FINANCIAL PLANNER™ (CFP®) and Certified Trust and Fiduciary Advisor (CTFA), I help high-net-worth families, executives, veterans, and nonprofits make confident decisions about complex financial lives.

After twelve years at USAA Wealth Management, I joined Genesis Wealth Management in 2020. The Wealth Planning for Life™ process reflects not just Genesis values but my commitment to guiding clients through every stage, from accumulation to legacy. My work emphasizes integrity, candor, and accountability in every relationship.

I understand everyone experiences what truly matters in life differently, and I forge a pathway for you to embrace life to the fullest. Grounded in this, I begin every plan by aligning money with purpose, helping clients turn resources into clarity and opportunity.



*Fourth of July Parade*

An Austin native, I serve in several civic and philanthropic roles, with recent Board roles with the Westlake Chamber of Commerce and the Austin Club.
I also enjoy scuba diving, motorcycles, and time outdoors.


People first.
It's a simple principle that informs everything I do, from wealth management to community service.
TRAMMELL COOPER, CFP®, CTFA

## THE GENESIS WAY

# OUR PROCESS IS WEALTH PLANNING FOR LIFE™





# HEAR FROM OUR CLIENTS AND PARTNERS

*“His dedication and compassionate support for my well-being surpasses all my expectations."*
**- Joyce G.**

*“One of the best financial decisions I have ever made was partnering with Trammell and Genesis for my wealth management! He has worked very closely with me for several years and has provided fantastic guidance and results. My finances are in great hands and I couldn’t be happier.”*
**- Major David King, U.S. Army (Ret.)**

*This statement is a testimonial by a client of the financial professional as of 03/30/2026. The client has not been paid or received any other compensation for making these statements. As a result, the client does not receive any material incentives or benefits for providing the testimonial. These views may not be representative of the views of other clients and are not indicative of future performance or success.*

# WHOM WE SERVE

We serve clients at all stages in their financial wellness paths, including veterans, USAA employees, retirees, families and individuals, executives, business owners, institutional clients, medical professionals, nonprofits, and many others.

## VETERANS

Rooted in serving veterans, our team is uniquely experienced and honored to guide those who served our country to work toward securing their financial future.






## RETIREES

We partner with retirees in charting a path that optimizes for fulfilling lifelong dreams by securing a solid foundation, and planning for wealth distribution.



# FAMILIES AND INDIVIDUALS

Our team is experienced in addressing today's unique financial complexities, offering customized solutions that maximize families' assets and build a foundation for future generations and the causes they support.





# EXECUTIVES

We specialize in serving high-achieving business executives, in helping to create a long-term plan that puts them firmly on the path of turning today's success into long-term financial stability.





# NONPROFITS

We specialize in guiding nonprofits throughout their journey of service, from establishment to strategic development, to ensuring their mission is positioned to continue to serve their community. With deep expertise in advising nonprofits, and extraordinary passion for charitable missions, we are uniquely equipped to partner with your nonprofit to fulfill its promise, for generations to come.









*I discovered as a child that my purpose here was to do all I could do to improve the lives of others. I am fulfilled when my work and effort achieves that end.* - Trammell Cooper



# HEAR FROM OUR NONPROFIT CLIENTS AND PARTNERS

*"Trammell is more than a wealth manager—he's a trusted partner to our nonprofit. He understands our mission and brings a high level of detail and care to his work. His expertise and guidance give us confidence in our financial decision-making."*
- Adam Powell, Executive Director,
Austin History Center Association

*"Trammell provides clear, steady financial guidance and takes the time to understand both our current needs and long-range goals. His involvement and support across several committees have made him a valued partner in the stewardship of our club."*
- Paul Kornfield, General Manager, The Austin Club

*"Trammell's steady counsel, thoughtful guidance, strong leadership, and expertise keep our Investment Committee well-informed. His involvement and insight have made him a valued partner in supporting our organization's financial oversight."*
- Joe Pacheco, Board Member, Investment Committee Member,
Austin History Center Association

*This statement is a testimonial by a client of the financial professional as of 03/30/2026. The client has not been paid or received any other compensation for making these statements. As a result, the client does not receive any material incentives or benefits for providing the testimonial. These views may not be representative of the views of other clients and are not indicative of future performance or success.*

# OUR EXPERIENCES

**We aim to deliver extraordinary client experiences that keep you with us for life.**

**Optimism**
Feel positive about your plan to pursue financial security.

**Freedom**
You are empowered to dream freely.

**Confidence**
Leave our meetings feeling confident and secure.

**Peace**
Experience a profound sense of peace, knowing you are in professional hands.










**Our goal is to guide you towards wealth creation, growth, and tax-efficient wealth distribution. We are anchored by our steadfast core values.**
**Every day. For life.**

GENESIS

create grow distribute
Wealth Management

# CORPORATE SNAPSHOT 2026

Built on relationships. Focused on the future.



## GENESIS AT A GLANCE

**$2.50B**

Assets Under Control
AS OF SEPTEMBER 2026

**37**

Total Team Members

24 Wealth Managers
Including 21 CFPs®
13 Support Staff

**325**

Years of Combined Experience

**4**

Office Locations

**2,700+**

Client Relationships
AS OF SEPTEMBER 2026

# A DECADE OF GROWTH



Founded in 2016 by three former USAA senior wealth managers, Genesis Wealth Management was built to deliver a better client experience, one rooted in fiduciary advice, objective guidance and long-term partnership.

Over the past decade, we've grown to a dedicated team of 37 professionals including 21 CFPs serving clients across the United States.

Our mission remains the same: to bring confidence and clarity to your financial life today and for generations to come.

## OUR LOCATIONS

- San Antonio, Texas
- Fair Oaks Ranch, Texas
- Austin, Texas
- Tampa, Florida

## OUR WEALTH MANAGEMENT FOCUS

- **Personalized Financial Planning**
- **Investment Management**
- **Risk Management**
- **Estate & Legacy Planning**
- **Multi-Generational Wealth Strategies**

## OUR STRATEGIC PARTNER

LPL Financial

Through our relationship with LPL Financial, we have access to leading-edge technology, research and resources, allowing us to focus on what matters most: providing highly personalized advice and exceptional service to our clients.

## BY THE NUMBERS: LPL FINANCIAL

*LPL DATA AS OF MARCH 2026*

**#1**
Independent Broker Dealer[1]

**$2.40T**
Assets Under Custody AS OF MARCH 2026

**FORTUNE 500® [2]**
Ranked No. 340

**29K+**
Financial Professionals Served

Securities and advisory services offered through LPL Financial, a registered investment advisor, Member FINRA/SIPC. Tracking #1174743

**1. LPL Financial is the No. 1 Independent Broker-Dealer in the U.S., based on total revenues, as reported by Financial Planning magazine. Source: LPL Financial Q1 2026 Investor Presentation.**
**2. Fortune 500® ranked LPL Financial Holdings No. 340 (2025). Source: LPL Financial Q1 2026 Investor Presentation.**

# THE GENESIS TEAM
# STRONGER TOGETHER



We believe that when you partner with one Genesis Wealth Management advisor, you partner with the entire team. All of our wealth managers are CERTIFIED FINANCIAL PLANNER™ practitioners, with over 250 years of wealth management experience combined.

Genesis Wealth Management advisors' experience and skills guide you through all phases of life. You can take comfort in knowing that we have the time, attention, and expertise to address every dimension of your wealth – now and for generations to come.



*Genesis Wealth Management Team*

GENESIS

Wealth Management

Trammell Cooper, CFP®, CTFA
Trammell.Cooper@GenesisWealthTX.com
512.294.6446

Securities and advisory services offered through
LPL Financial, a registered investment advisor,
Member FINRA/SIPC.