CROWN WEALTH™
STRATEGIES

2023

ANNUAL LETTER

www.crownws.com

message from

LIZZIE DIPP METZGER

CFP®, AEP, MSFS

PRESIDENT
Financial Adviser*, Forbes Top Security Professional
CA Insurance License #OM77202

For several years now, I have been privileged to share with you all the exciting developments that we have made at Crown from the previous year. Well, this past year was a year that is one for the record books.
I don't think I was alone in hoping that we were going to have a very different 2022 than the previous years.
It was certainly different, but not the "return to normal" we had expected.

I learned some new lessons in 2022, and some of life's previous lessons were reconfirmed to me.

Here's a few of them:

Slow and steady win the race – even as people flocked to the latest craze after another, we stayed true to our philosophy. Well built, diversified portfolios filled with vetted investments. As volatility hit us and looks to be here for a while, we believe in the strength of our portfolios, built for all weather.

Always keep your commitments –What struck me the most was how important the commitments we make are. Whether it's commitments, to family, friends, or clients, our word is our bond. Life is precious.

Balance accumulation with protection – growing your investment account is always fun. It's hard to deny the thrill of watching your investments.

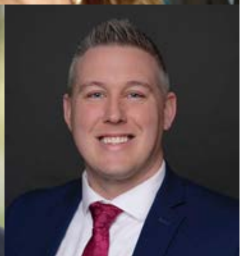
Keep your goal in sight – When things change, it's easy to take your eye off the ball.

We have had a year of wonderful accomplishments and growth, and every change is not only because of our wonderful clients but also benefits you and those you love as well. I'd like to thank you for giving me the opportunity to continue working with you. The Crown Wealth Strategies family appreciates your business and loyalty.
Our continuous goal is to provide superior service and to constantly improve. Above all, working in your best interest remains our top priority and we will remain committed to making every effort to maintain your trust and satisfaction.

Thank you again for entrusting us with your goals. We are thrilled to be able to continue to help you.
Here's to a wonderful 2023!

Top Financial

SECURITY PROFESSIONALS



I'm thrilled to share that I, Andrew Snyder, and Kris Preble all were honored to be part of the Forbes Top Security Professional List. I am beyond proud that our advisors have been recognized by Forbes for their dedication to their clients. Here's a bit more information about this honor.

SHOOK Research's rankings are based on one simple notion: "Would we recommend these professionals to a family member or a friend?"

We've all seen rankings based on how much money people make—athletes, entertainers, artists, company founders, billionaires, corporate executives, and even rankings of financial professionals. Numbers don't tell enough of the story.

If you needed a life-critical operation, would you choose a surgeon solely based on how much money he or she makes? Arguably the most important quantitative element would be how many surgeries the doctor performed and the success rate. But there is much more to our rankings. We look for individuals who are best prepared to engage in more meaningful conversations about life while protecting against the perils posed by disability, death, or job loss.

To accomplish this task, we collect quantitative data, but we also interview FSPs to see if they are a role model we would recommend to the world.

There is a lot riding on our recommendations. More than 6 million Forbes readers and 116 million unique monthly visitors to Forbes.com have come to rely on our research to plan their financial futures.

The SHOOK Process

Our process begins by scouring the financial services industry—life insurance companies, banks, brokerages, agencies, custodians, and others for nominations. SHOOK accepts professionals who meet pre-determined minimum thresholds and acceptable compliance records.

FSP refers to professionals who are properly licensed to sell life insurance and annuities. FSPs may also hold other credentials and licenses which would allow them to offer investments and securities products through those licenses.

To date, SHOOK has evaluated more than 15,000 professionals for consideration in its rankings published by Forbes. Industry executives and peers nominated double that figure to 35,465. Not all met our standards for consideration and ranking.

SHOOK Research does not receive a fee in exchange for rankings.

BRIAN METZGER

LEADS IN
BUSINESS DEVELOPMENT

BRIAN HAS BEEN INTEGRAL TO CROWN'S EXPANSION. Through his efforts, we are now have advisors in Alabama, Oregon, as well as 5 professionals in Texas. We continue to work as we build out and improve our processes as we expand.

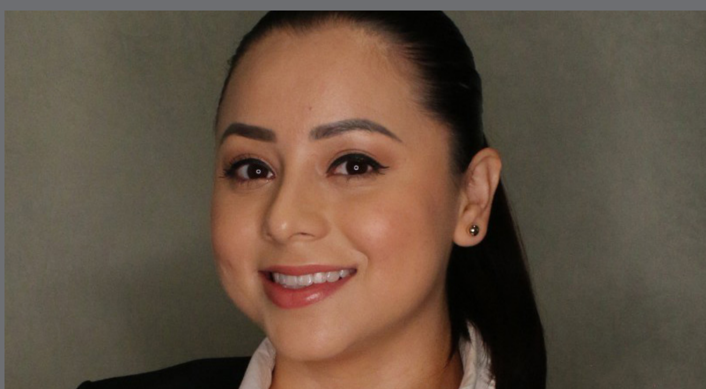
This strategy has included opening and training professionals in our new offices to include our own Crown Wealth Strategies Building, a cutting-edge diversified financial center in El Paso for corporations, physicians, business owners and families.

Brian brings to Crown Wealth Strategies a singular combination of credentialed financial expertise and proven management experience. Through his efforts we continue to scale our unique business model providing world-class wealth strategies and estate planning to our clients on a highly customized basis.

MEET

THE TEAM

We are thrilled to introduce some of our team members.



Andrea M. Perez

Financial Planning Coordinator
Born And Raised In El Paso, TX
Ba In Political Science & General Business
Master Of Business Administration
Part Of Crown Family Since 10/2022

Christine Walker

Director Of Operations
Originally From Washington State
Proud Navy Wife
Killer Combo Degrees In Applied Mathematics & Creative Writing
Part Of The Crown Family Since 2021

Viviana Hernandez

Director Of Client Relations
10+ Years Of Experience In The Financial Services Industry
Killer Combo Of Degrees In Marketing & International Business Degrees
Part Of The Crown Family Since 2019

OUR PHILOSOPHY

We're committed to focusing on the interpersonal relationship between us and our clients. We know the perfect recipe for success is half technological resources and half client relationships. Our philosophy circles around eight core beliefs.

We Believe...
IN A HIGHER STANDARD.

We Believe...
IN HAVING ACCESS TO MULTIPLE PRODUCT OPTIONS.

We Believe...
IN PROVIDING VALUE FOR OUR FEES.

We Believe...
THAT MONEY MANAGEMENT WORKS.

We Believe...
IN INTEGRATING SOLUTIONS.

We Believe...
IN GOALS-BASED INVESTING.

We Believe...
THAT THE TORTOISE WILL ALWAYS BEAT THE HARE.

We Believe...
IN A HOLISTIC, COMPREHENSIVE APPROACH.

(915) 613-4300
clients@crownws.com | www.CrownWS.com