# Grateful for the Recognition—Even More Grateful to Serve You

Greetings!

I'm honored to share that I've once again been named to the Forbes National FSP (Financial Security Professional) list. This recognition reflects the work we do together—and the trust you've placed in me.

I want to reaffirm what matters most: a planning process built around your goals, supported by clarity, strategy, and consistency.

I've also included a brief article on the value of having a trusted advisor, especially during uncertain markets. I hope you find it useful.

If it's time to revisit your plan or priorities, I'd love to reconnect. Thank you for allowing me to be part of your journey.

Lizzie Dipp Metzger
FOUNDER

CROWN

WEALTH STRATEGIES

*Lizzie Dipp Metzger*

***CFP®, CPWA®, AEP®, MSFS***

**Named to the 2025 Forbes Top 100 Financial Security Professionals in the Nation**

**Five Years Running 2021 – 2025**

****Ranked Top Female in Texas in 2025***

Read more about the Forbes SHOOK®Research Top Financial Security Professionals list and the ranking methodology here: https://www.forbes.com/ sites/rjshook/2025/07/10/methodology-americas-top-financial-security-professionals-2025/

Forbes 2025 | TOP FINANCIAL SECURITY PROFESSIONALS
SHOOK® RESEARCH

## YOUR PERSONAL CFO

### LIZZIE METZGER

**CFP®, CPWA®, AEP®, MSFS**

Through our Bespoke Financial Management service, our founder and principal advisor, Lizzie Metzger, takes the role as your family's CFO. She'll work closely with you to help you navigate the complexities of personal wealth management, and she'll provide personal guidance and insight about your financial landscape. You'll have a dedicated team of professionals devoted to helping you achieve your goals.

## COMPANY OVERVIEW

When it comes to wealth management, our ultimate goal is to preserve family unity and harmony. We've personally experienced the tension that can result from poor planning, and we want to prevent that for our clients' families. That's why we're incredibly passionate about helping people develop thorough plans that allow them to keep the peace and enjoy their wealth for generations. There are countless moving parts to your financial plan, and our job is to make sure everything moves in the right direction year after year, for generations to come.

## STANDARD VS. BESPOKE MANAGEMENT

Bespoke Financial Management is our highest level of service and is a custom offering reserved for a select 10-15 clients per year. Many of our clients begin with Personalized Financial Planning and transition to Bespoke Financial Management as their wealth becomes more complex. When we take on a Bespoke case, we become like your family's CFO. We oversee the big picture, coordinate with the important people in your life—your CPA, attorneys, beneficiaries, spouse—and manage the details so you can stay focused on what you do best. We'll help you address questions such as:

- How do I make sure my estate is distributed fairly after I'm gone?
- What do I do if my son or daughter doesn't want to take over the family business?
- What's the best way for me to give back to the causes I care about?
- How do I make sure I'm not overlooking something important?
- Where do I even start?

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READ THE COMMENTARY


## NEED TO SCHEDULE?

We are now able to meet in person, via phone or Zoom! We are here to work with you whatever your preference!

Try our new easy scheduling system, just choose the type of meeting and date/time that works for you and schedule anytime!

Schedule a Review

**ESTATE PLANNING** **BUSINESS PLANNING** **PERSONAL PLANNING**

## Give Us A Call

**915-613-4300**

Email Us

Create a Plan

Get The App

Visit the client portal!

## Your Team


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Crown Wealth Strategies is a comprehensive wealth planningpracticein El Paso, Texas, that provides clients with an integrated investment and insurance strategy focused onmaximizing value over the course of their lifetime.Elizabeth Dipp Metzger Member Agent, The Nautilus Group®, a service of New York Life Insurance Company - www.TheNautilusGroup.com. Financial Adviser offering investment advisory services through Eagle StrategiesLLC, a Registered Investment Adviser. Registered Representativeofferingsecurities through NYLIFE Securities LLC, Member FINRA/SIPC, a Licensed Insurance Agency, • 303 N. Oregon Suite 1100 El PasoTX 79901 • 915-534-3200.Crown WealthStrategies, its agents, employees and affiliates do not provide tax, legal or accounting advice.Read more about the Forbes SHOOK®Research Top Financial Security Professionals listand the ranking methodology here: https://www.forbes.com/sites/rjshook/2024/07/10/method ology-americas-top-financial-security-professionals-2024/. Council is an annualNew York Liferecognition program based on agent production fromJuly 1-June 30.Crown Wealth Strategies is not owned or operated by Eagle Strategies LLC, NYLIFE SecuritiesLLC, or their affiliates.



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