

NEWS

For Immediate Release

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Angela Wilson, Paul Lightfoot, Archie Ponce

Optima Asset Management Relocates, Announces New Website

*Dallas-based independent Registered Investment Advisor has been putting
clients' interests first for almost 25 years*

DALLAS (Nov. 7, 2019) – [Optima Asset Management](#), an independent Registered Investment Advisory firm located in Dallas, Texas, today introduced its redesigned logo and website, and announced the relocation of its offices.

After many years on Merit Drive, the firm recently opened new offices at 8144 Walnut Hill Lane. A private reception for clients and friends of the firm will be held there on Tuesday, Nov. 12, 2019.

“Optima has been serving clients since 1995,” said President Paul Lightfoot, CFP®, CIMA®. “We continue to follow the mission of our founder, Nolan Jones, who had a singular focus of always putting the client’s interest first, above all else. Our foundation is customized portfolio design and management. While many clients partner with us explicitly for our expertise in investment management, many others utilize us for our holistic, multi-generational wealth management approach for the entire financial lifecycle.”

“We are excited about our new website and the information it offers regarding the kinds of clients we work with and what we have been able to do for them,” said Vice President Archie Ponce, CFP®. “Whether you’re a millionaire next door, have emerging wealth, are suddenly single, or have received a significant inheritance, we have extensive experience in helping you achieve your financial and life goals.”

Frequently quoted in the media, including *US News and World Report*, *the Wall Street Journal*, *Bloomberg magazine*, *Texas Monthly*, *D Magazine* and *Dallas Morning News*, the firm’s approach with clients is that wealth is more than just money: It’s financial security for the client and the family, it’s about creating a legacy for loved ones and causes, and it’s about creating life experiences through travel or passions.

“Our independence, our commitment to putting clients first, and our approach to planning are the reasons we have experienced such low turnover and why our growth has always come from referrals,” said Lightfoot. “Our clients’ trust and loyalty mean everything to us.”

ABOUT OPTIMA ASSET MANAGEMENT

Since its founding in 1995 by the late Nolan Jones, Optima Asset Management, based in Dallas, has employed a holistic, multi-generational approach to wealth management. A Registered Investment Advisory firm, Optima serves as a fiduciary, providing clients an alternative to the Wall Street firms by working exclusively for their best interests and helping them to be smart with their wealth. The firm’s objective is to empower clients to effectively control the purpose and results of their wealth. For more information, visit www.optimaassetmgt.com.