

SOUTH TEXAS MONEY MANAGEMENT, LTD.

*"Helping Individuals, Individually."*TM

WWW.STMMLTD.COM

AUSTIN
5000 PLAZA ON THE LAKE, SUITE 170
AUSTIN, TEXAS 78759
TEL 512-342-2272 • FAX 512-342-2287

SAN ANTONIO
100 W. OLMOS DRIVE, SUITE 101
SAN ANTONIO, TEXAS 78212
TEL 210-824-8916 • FAX 210-824-8718

HOUSTON
720 N. POST OAK, SUITE 124
HOUSTON, TEXAS 77024
TEL 713-683-3818 • FAX 713-840-7374

Lisa Fox joined South Texas Money Management in April 2006 as a Senior Investment Advisor. As part of the addition of the Austin office, she will be responsible for a broad range of services including financial planning for the firm's individual clients.



Prior to joining South Texas Money Management, Ms. Fox was Vice President and Co-Owner of Third Coast Wealth Advisors, the Austin firm acquired by South Texas Money Management in 2006. She was part of Third Coast Wealth Advisors for almost seven years with responsibilities that included business and operations management, client relationship management, and providing financial planning services to clients and prospects. She also served as the firm's Chief Compliance Officer responsible for creating and maintaining compliance procedures and completing the required SEC filings.

Before joining Third Coast Wealth Advisors, Ms. Fox spent five years working for Frost Bank in both the Galveston and Austin locations in the personal trust area. As a Trust Officer, she was responsible for administering a broad range of trusts including court-created trusts, testamentary trusts, special needs trusts, revocable trusts, and individual investment management accounts. Prior to Frost Bank, she worked twelve years in the commercial banking industry gaining a wealth of experience in that arena.

Ms. Fox has a Bachelor of Science degree in Business Professional Studies from Western Governors University. She received her Certified Financial Planner designation in 2004 after passing the certification exam that July. She has also completed an educational program in divorce planning earning her designation as a Certified Divorce Financial Analyst allowing her to provide in-depth financial expertise in divorce cases. In addition, she attended the Texas Trust School at Southern Methodist University in Dallas graduating as the top student of the class and Texas Trust School II in San Antonio graduating in the top five of her class.

Ms. Fox is a member of The Financial Planning Association, The Estate Planning Council of Central Texas, and Toastmasters International. An avid reader and fitness person, she also strives to continually expand her education, currently working on her MBA from Boston University with a specialization in Banking and Financial Services Management.