

Sam Ali, CFP®, CRPC®, CFS®

1010 N. San Jacinto, Suite 200, Houston, Texas 77002

Phone: 713-581-1998

sali@manskewealth.com

Since 2012: Manske Wealth Management

Manske Wealth Management offers investment advice and financial planning with a primary focus on monthly client communication. The firm's accomplishments include:

- 2019 Recognized as the eighth largest Registered Investment Advisory firm in Houston by Financial Advisor Magazine
- 2009-2018 Named Five Star Wealth Manager by Texas Monthly Magazine
- 2018 Named the ninth largest Registered Investment Advisory firm in Houston by Financial Advisor Magazine
- 2017 Selected as one of The Best Places to Work in 2017 by Houstonia Magazine
- 2014 Named "Most Client Focused Wealth Manager – Texas" by Wealth & Finance International Magazine

Senior Financial Advisor

He leads the firm's effort providing specialized guidance to long-term employees at Chevron and Schlumberger. When these careerists retire or change firms, I help them navigate that transition, often uncovering strategic advantages that most investment advisors are unaware of, like getting the lowest possible tax treatment on their company stock. His accomplishments include:

- Currently in good standing with the board as a CERTIFIED FINANCIAL PLANNER™
- Co-Chair of Manske Wealth Management Investment Committee
- Founder of Business & Baseball – Professional Networking After Hours
- Keynote Speaker at many events to include:
 - Winner's Circle networking group in the Galleria attended by 30+ business professionals
 - Galleria Tennis and Athletic Club breakfast event with 35+ professionals in attendance
 - Toastmasters International Competition attended by 100+ speakers
 - Lake Houston Area Chamber event attended by 50+ local business owners
- Received Five Star Wealth Manager award in 2018 & 2019 where less than 8% of candidates were selected
- Nominated for Forbes 2018 Top-1000 Next Gen Wealth Advisors award
- Quoted by Forbes in December 2017 – "Financial Advisors: 5 Best Stock Investing Ideas For 2018"
- Published in U.S. News & World Report in November 2016 – "How to Bear Down in a Declining Stock Market?"
- Recognized in the Wall Street Journal in July 2014 for the most accurate financial modeling in a nation-wide WSJ "stock forecast" problem
- Completed Rice University's CFP® Certification Education Program
- Achieved the Chartered Retirement Planning Counselor designation (CRPC®) via the College for Financial Planning
- Earned the Certified Fund Specialist designation (CFS®) via the Institute of Business and Finance

Organizations

- ❖ Current Member, Business Network International
- ❖ Current Member, Lake Houston Area Chamber
- ❖ Past Member, Toastmasters International

Personal & Odd Facts

- Native Houstonian married to Maysa and together they raise their son Ahmad near Lake Houston
- Has an extreme fear of heights, yet he loved his skydiving and zip lining adventures
- Raising his son to become the Houston Rockets #2 sports fan (after himself)
- Banana pudding or bread pudding? I'll take both!
- Ask about his 21-day, 5-country travel extravaganza!
- Occasionally suffers from Peaky Blinders withdrawals

Education: University of Houston

B.S. Economics

Favorite Quote

"Work is love made visible. And if you can't work with love, but only with distaste, it is better that you should leave your work and sit at the gate of the temple and take alms of the people who work with joy" – Khalil Gibran