

carter financial
management

Date: May 29, 2014

Pay to the Order of: Texas A&M fbo Jorge R. Santana \$ 11,500.00

Eleven Thousand Five Hundred and ^{no}/₁₀₀ Dollars

For: Four-Year College Scholarship

Bill Carter
Authorized Signature

For Immediate Release

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Carter Financial Management awards \$11,500 scholarship to local high school student

Valedictorian receives scholarship to attend college, achieve dream of becoming an architect

DALLAS, June 4, 2014—[Carter Financial Management](#) has named Jorge Rodriguez Santana, a senior at [Emmett J. Conrad High School](#) in Dallas, the recipient of an \$11,500 scholarship to pursue a degree in architecture at Texas A&M University. Santana is also the 2014 class valedictorian.

“I will be the first in my family to attend college and I am so grateful for the opportunity,” said Santana. “I had almost lost hope that there would be enough money for me to get into college, and now I am on the way to making my dream come true.” Conrad High School is a part of the Dallas Independent School District and is located in Vickery Meadow.

Jorge said he knew he needed to work hard to realize his dream of success. He moved to Dallas at the age of 12 and learned English in school. He remained motivated by visualizing who he wanted to be: a successful architect wearing a construction hat and holding blueprints of a road or building he’d designed. As a young boy, he learned about the construction business from his uncles.

Graduating as class valedictorian, Jorge challenged himself academically with advanced placement courses. He also learned teamwork and leadership skills through many extracurricular activities in which he served as captain or group leader.

To earn the scholarship, Jorge completed an essay on what he believes are the qualities for financial success in life. He also interviewed with a nine-person selection committee that included [Bill Carter](#), founder and president of Carter Financial Management, a leading financial services firm based in Dallas. The company launched the scholarship program this year to recognize local high school students who excel, work hard and believe in their own ability to pursue their dreams and careers.

“At first, I was really nervous because I didn’t know what to expect at the interview,” said Santana, “but it was very encouraging and friendly. I was so motivated by their responses. Mr. Carter even said that maybe one day he would invest in my future architecture firm, and that was so exciting to see how he believed in me.”

Bill Carter, president of Carter Financial Management, believes the scholarship program is a reflection of the firm’s commitment to help clients reach their goals of financial independence through planning and goal-setting.

“Jorge has a plan for his life that he focused on since he was a young boy,” said Carter. “The committee was very impressed with his values and commitment to becoming an architect, having his own firm and earning a doctorate degree one day. He is an impressive young man and we believe that he will continue to be successful.”

“I think you have to work for your dreams and apply yourself as much as possible. The main thing is to keep on going and don’t get down. I would tell other students to apply for scholarships and apply themselves to get what they want out of life.”

While he's not sure what to expect at college, Jorge said he is ready to become a Texas A&M Aggie. "I don't know what to really expect but am ready for the opportunity. As they say, Gig 'em," he said with smile.

The company also plans a 2015 Carter Financial Management Scholarship program but deadlines and the application process will not be announced until January of 2015. Information will be posted online at www.CASCFM.com.

About Carter Financial Management Inc.

Carter Financial Management is an independent financial planning firm based in Dallas providing client-centered wealth management services to affluent individuals, families and business owners. The firm offers a true one-stop-shopping experience, with equal strengths in planning, implementation and management. Its advisers' relationship with Raymond James Financial Services allows the firm to provide the personalized service of a small boutique, coupled with the vast resources of a global firm. For more information, visit www.CASCFM.com or call 214-363-4200. For media inquiries, call Roy Miller at 903-422-5117, or e-mail him at rmiller@rgmcomms.com.

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Carter Financial Management is located 12222 Merit Drive, Suite 1800, Dallas, Texas 75251. Securities offered through Raymond James Financial Services, Inc., Member FINRA/SIPC. Raymond James is not affiliated with the scholarship program mentioned in this article.