Meet the Team

Creating successful solutions and earning lasting relationships!

6PILLARS
FINANCIAL SERVICES

SIX AREAS OF *FINANCIAL PLANNING*

ESTATE PLANNING —
Developing an estate plan can help make sure your intentions are met for your beneficiaries.

RETIREMENT PLANNING —
According to your goals and plans, we provide the strategies needed to manage your retirement savings.

TAX PLANNING STRATEGIES —
Based on your unique circumstances, we provide guidance for ways to efficiently manage your assets taking taxes into account.

WEALTH ACCUMULATION —
Together, we determine your goals, assets and liabilities as they impact your net worth.

RISK MANAGEMENT —
A comprehensive financial plan helps you manage the risks that could undermine your goals, deplete your assets or threaten your income.

FINANCIAL POSITION —
Every financial plan must include an accurate understanding of your income and expenses today and in the foreseeable future.

6PILLARS
FINANCIAL SERVICES

OUR PROCESS

No matter what your priorities are, it is important to follow a process to help identify your goals and potential solutions. Our team uses a process that we have found helpful with people for building financial clarity.

What differentiates our team is our disciplined approach to financial planning and our commitment to team with other advisors, professionals, and our Advanced Markets resources to help us deliver sophisticated solutions to address our clients' most complex challenges.

Adam Blye

Financial Services Representative, Principal Securities Registered Representative,
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Adam is a third-generation risk advisor and for the past 10 years has worked with families and business owners to protect against the unexpected and prepare for their financial future. Working with a network of highly-skilled professionals, he is dedicated to providing experienced advice on wealth management, retirement planning, educational savings, and insurance planning.

Adam earned a Bachelor's of Arts in Communication from Stephen F. Austin 2007. In his spare time he spends time with family, lives an active lifestyle, and enjoys giving back to the community. He lives these priorities by serving on his church board, volunteering with the United Way, seeking perfection on the golf course, and supporting the Texas Longhorns.

Michael Affleck

Financial Services Representative, Principal Securities Registered Representative, Financial Advisor
Phone: (512) 401–0036 | Email: mike.affleck@tetragroup.net | Fax: (512) 366-9807

With over 27 years of experience in the financial services industry, Michael has extensive knowledge in: 401(k), Pension, and Profit-Sharing plans, Group Health, Life, and Disability insurance, Section 125 (Cafeteria) plans, and Flexible Spending Accounts. He has utilized his experience in working with small to middle-market companies, as well as major corporations.

Michael earned a Bachelor's of Arts in Psychology from The University of Maryland in 1989. He has written and published articles in the Capitol Business Gazette. In his personal time, he enjoy sports, traveling, and spending time with my family and friends.

Juan Carlos (JC) Barcena, MBA

Financial Services Representative, Principal Securities Registered Representative,
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Juan Carlos (JC) Barcena works with businesses and individuals to create strategies to help them achieve financial success. He specializes in financial strategies, retirement planning, and employee benefits.

JC is the first one in his family to learn English and to attend and graduate from college. He has an undergraduate degree from the University of Texas and his MBA with a concentration in Finance from Keller School of Management. He is a member of the Greater Austin Hispanic Chamber of Commerce and participates in the Economic Development and Ambassador Committees. JC is happily married to his wife of ten years, Miranda, and together they raise their son and daughter on good morals and values to help them make this world a better place.

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