ALTITUDE
FINANCIAL MANAGEMENT

The information provided is not written or intended as specific tax or legal advice. Altitude Financial Management, LLC, its employees and representatives are not authorized to give tax or legal advice. Individuals are encouraged to seek advice from their own tax or legal counsel. Securities and investment advisory services offered through qualified representatives of MML Investors Services, LLC. Member SIPC [www.SIPC.org] 701 5th Avenue Suite 100, Seattle, WA 98104. 206-628-8800. Altitute Financial Management, LLC is not a subsidiary or affiliate of MML Investors Services, LLC.or its affiliated companies.

Altitude Professional Network

Altitude Financial Planning Process

Our process involves understanding where you are today financially, identify where you want to be 10, 20, 30+ years from now, and to design a custom plan that helps gets you there.

Altitude clients gain access to our trusted professional network. As Financial Planners we pride ourselves in our ongoing advice, not products or investment solutions. Often times client solutions call for expertise outside of our core business areas. By having a professional network, our clients are able to connect with experts that can provide the necessary advice. Altitude works side by side with clients on their implementation plans to ensure every area of planning is properly addressed. We are able to engage with clients in a multitude of ways and our fee structure is primarily driven by complexity.

What to Expect

Stage 1: Exploratory meeting and financial data gathering.

Stage 2: Draft plan review and discussion of potential recommendations.

Stage 3: The delivery of your financial plan and review of all recommendations.

*Financial plan recommendations can be implemented with the advisor of your choosing. Implementation of specific products or services may result in commissions or fees outside of the financial plan fee. Periodic reviews of your financial plan may require a new planning agreement and result in additional fees.