



PHILANTHROPIC SERVICES

WHAT IS A LEGACY AGENT?

Our clients, a select group of successful families, foundations and endowments, essentially see us as their legacy agent. The notion of a “**LEGACY AGENT**” may be foreign to you so allow me to frame what it is by engaging you in a quick thought experiment—*If I were to ask you how many of your 8 great-grandparent’s first names you were able to recall, how many would it be? 2? 3?* Our clients want to be remembered—they want their values passed down, their stories, experiences and passions passed down—and they come to us to help them build legacies that they can be proud of for generations to come.

At **ALINE WEALTH** we pride ourselves on being that legacy agent for our clients—through a host of vehicles—from Donor Advised Funds and Charitable Remainder Trusts to Private Foundations and Endowments established at a favorite non-profit—we steward our clients’ legacy capital through a distinct process.

That process starts with a deep discovery—understanding our clients’ concerns—both financially and emotionally—to understand what makes them tick. *What are their objectives, risk tolerances, liquidity needs and any tax and/or unique circumstances?* This information is organized in an **INVESTMENT POLICY STATEMENT**—so that we are always on the same page with our clients. We then work with our clients and collaborate with their other advisors (attorney, tax advisor, banker, insurance professional) to develop—and to ensure that they stay on track, that nothing falls through the proverbial cracks—a **COMPREHENSIVE WEALTH MANAGEMENT PLAN**.

The wealth management plan is the blue-print for the client’s legacy; combined with a dynamic communication process we are able to insure that our clients’ **INTER-GENERATIONAL PLANS** are well thought out and stay on an optimal glide path to success.

ALINE Wealth is a team of investment professionals registered with HighTower Securities, LLC, member FINRA, and SIPC & HighTower Advisors, LLC a registered investment advisor with the SEC. All securities are offered through HighTower Securities, LLC and advisory services are offered through HighTower Advisors, LLC. HighTower shall not be liable for claims related to this writing.

