



# Frequently Asked Questions

## **1) I received an email/read about the formation of ALINE WEALTH? What does this mean for me?**

Mark Kravietz and Peter J. Klein are merging their practices to form ALINE. As a client, you will now have access to a more robust financial team and an even wider array of service offerings.

## **2) Will these changes affect my account in any way?**

No. ALINE will continue to be powered by Hightower. Your custodian (Fidelity) will not be changing. You will notice our new team name printed on your statements and reports going forward. We will continue to serve as a fiduciary to help you achieve your wealth goals. Our client-centric, holistic approach has not changed. You will also continue to work with the same team. However, this team is now expanded. Please take some time to meet the entire [ALINE team](#).

## **3) Why did you make these changes?**

As your wealth advisors, we are always trying to improve your experience. Mark and Peter have worked together for over 30 years. They even made the move to Hightower together, where they have shared an office ever since. The formation of ALINE was simply a natural progression. We are confident that this new endeavor will result in an improved overall client experience and could help you achieve even greater successes going forward.

## **4) What does ALINE mean?**

ALINE means comprehensive, holistic wealth management solutions with a decidedly human touch. We will work tirelessly to ensure your goals and needs remain 'ALINED' through every twist and turn of your financial journey.

ALINE Wealth is a team of investment professionals registered with HighTower Securities, LLC, member FINRA and SIPC, and with HighTower Advisors, LLC, a registered investment advisor with the SEC. Securities are offered through HighTower Securities, LLC; advisory services are offered through HighTower Advisors, LLC.

