VALUE PROPOSITION - PARTNER

Align Wealth Advisors' ultimate mission is to deliver preparedness and prosperity to its Partners, giving them the confidence in knowing their clients are becoming part of a well-organized, efficient, modern system where their needs are directly met and their money ultimately serves them.

PLAN.PREPARE.PROSPER.

- **PLANNING BASED ACQUISITION PHILOSOPHY** Align Wealth Advisors believes in proper planning and organization when acquiring new firms. Our stringent planning process ensures an efficient, transparent, organized transition for both our Partners and their clients.
- **BOUTIQUE FIRM COMPRISED OF HIGHLY EXPERIENCED AND EDUCATED ADVISORS** Align Wealth Advisors is fully staffed with two advisors, operations personnel, marketing personnel, and office personnel. We are well-equipped to bring on additional clientele as well as employees. Our departments are all run by top-notch, experienced managers, which ease the transition process immensely.
- **DELIVERS PREPAREDNESS** Align Wealth Advisors delivers a detailed transition plan to our partners in an attempt to map the transition from the beginning, leaving little room for error and providing all pertinent information to our partners up front.
- **RELATIONSHIP BASED–VALUE-DRIVEN** Align Wealth Advisors' Acquisition Program is built upon relationships. Those relationships mirror our client relationships, where we focus on values-driven objectives. We utilize those same principles with all our relationships, whether we are working on acquisition or partnership.
- **DELIVER PROSPERITY** Align Wealth Advisors' ultimate mission is to deliver prosperity to all our partners. The end goal is to live out your success, the culmination of your career, in the way you have always envisioned.