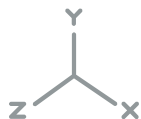


OVERVIEW

Why Fortress Wealth Planning

"Fortress" stands for safety and protection, and the word "Planning" because we believe everyone should have a clearly-defined plan in order to achieve and sustain their financial legacy. In our role as fiduciaries for you and your family, the word "protect" is of the utmost importance to us because, as you know, we take our duty as the protectors of your goals and assets very seriously. So seriously, in fact, that we wanted that mission reflected in our name.



Our Mission



Our Values



Experience



Knowledge & Flexibility



Coordination

Our Fiduciary Commitment

We serve you, your family and your business as fiduciaries. A fiduciary is an individual in whom another has placed the utmost trust and confidence to manage and protect property or money. It is a relationship in which one person has an obligation to act for another's benefit.

We are not beholden to sales agendas or proprietary products—rather, our partnership with HighTower gives us access to quality investment solutions from some of the top firms and service providers. Our model can enable you to benefit from competitive pricing, as well as a diverse selection of sophisticated products and services.

Legal

As fiduciaries, we are held to strict regulatory standards, designed to protect investors and high ethical standards.

In addition to our legal duty to put our clients' interests first, HighTower offers an added level of

— [LEARN MORE](#)

Reporting

With HighTower's Client Portal, a resource developed in partnership with eMoney (a market-leading software provider), we offer you a comprehensive, customized view of your wealth for enhanced, goals-based performance reporting. With sophisticated features that include a snapshot of your assets, monthly spending and budget tracking, our team uses this tool to help you address and meet your personal goals.

— LEARN MORE

Custodian

We maintain an important strategic relationship with Fidelity, a family-owned and privately held business with deep conservative roots. Fidelity is one of the largest asset custodian and brokerage firms in the world, with more than \$5.4 trillion in client assets. It did not need the bailouts and other Wall Street

--- [LEARN MORE](#)



Securities offered through HighTower Securities, LLC, Member FINRA/SIPC, [HIGHTOWER ADVISORS \(HTTP://WWW.HIGHTOWERADVISORS.COM\)](http://www.hightoweradvisors.com), LLC is a SEC registered investment adviser. [BROKERCHECK.FINRA.ORG \(HTTP://BROKERCHECK.FINRA.ORG/\)](http://brokercheck.finra.org)
Copyright ©2019 HighTower