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Wealth management solutions designed  
for the changes in your life.

Discover the Difference

# Who We Are / Why We're Different

FINANCIAL ADVISOR PHOENIX, AZ

As fiduciaries, we provide wealth management solutions that are free of many conflicts often found at other financial and brokerage firms. Because we act as a fiduciary and in your best interests, we prioritize and address your most pressing needs first, while not losing sight of the lesser-priority matters. Life today is far more dynamic and complex than ever before, so our approach is consultative and forward-looking. Yet it is nimble and decisive when unplanned events demand quick, but thoughtful and accurate decisions. At Alpha Fiduciary, it's not just about focusing on your rate of return. It's about positively impacting the lives of the people we serve with a unified approach to wealth management.

DISCOVER OUR WEALTH MANAGEMENT PROCESS

# Fiduciary Advice for Your Family's Life Journey

As we age, our circumstances and challenges often change as well. Having a fiduciary advisor that can adapt your family's wealth management strategy to meet these challenges is important. Alpha Fiduciary recognizes that life's bumpy journey may diminish your overall wellness and ability to enjoy life. We have taken what we have learned in our many years of experience in working with clients, and we have compiled and categorized community resources for many serious but common problems. These counselors, support groups, and other resources can have a meaningful and positive impact on your ability to navigate life's challenges. At Alpha Fiduciary, we want you to live your best life, and that means so much more than just managing your wealth.

DIVORCE

SUDDEN DEATH

JOB LOSS

OVERSPENDING

ADDICTION

ELDER ISSUES

[See All Life Events](#)

At Alpha Fiduciary, we want you to live your best life, and that means so much more than just handling your wealth.

Wealth Management Solutions For Your Whole Life

[Schedule a Consultation](#)

# **Awards and Recognitions**

\* See disclosures below.

## **Blog and Quarterly Report**

## [Choosing a Trustee is More Than Just Finding Someone You Can Trust](#)

🕒 May 21, 2019    👤 Arthur Doglione

You've worked hard to create your family trust. You hired a good attorney, funded the trust with your most important assets, and even carefully structured an investment portfolio to consider current and future beneficiaries' needs. But now who is going ... [Continue reading](#) ▶

## [How You Can Avoid State Tax by Changing to a South Dakota Trust](#)

🕒 May 9, 2019    👤 Arthur Doglione

People unfamiliar with trusts may mistakenly assume that trusts confer tax savings over what they would pay if they simply held assets in their own names. While this is almost certainly not the case—in fact, federal tax rates usually increase ... [Continue reading](#) ▶

## [Prudent Strategies for Successful Generational Wealth Transfer](#)

🕒 April 18, 2019    👤 Arthur Doglione

People often daydream about how inheriting a large sum of money could solve their most pressing problems. Less often do they think about how such wealth can complicate their lives and negatively impact future generations. But wealthy families the world ... [Continue reading](#) ▶

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\*The AdvisoryHQ award recognizes Alpha Fiduciary as a 2018 and 2019 Top Financial Adviser in Phoenix and Scottsdale AZ) ("AdvisoryHQ Award"). This award was based upon an independent analysis of multiple criteria of the Firm. For specific details about AdvisoryHQ's methodology for this recognition, please click on the following link: [www.advisoryhq.com/all-topics/#Methodologies](http://www.advisoryhq.com/all-topics/#Methodologies). Alpha Fiduciary did not pay or provide any compensation in connection with the AdvisoryHQ award. The AdvisoryHQ award should not be construed as an endorsement of the firm's advisory services. This award is not related to investment performance.

The Phoenix Business Journal "Top Investment Advisor" was given in both 2017 and 2018 based on our responses to a survey and their own ranking methodology, based on assets managed locally. For the full report, please see [www.bizjournals.com/phoenix](http://www.bizjournals.com/phoenix). Note that the full report requires a subscription. This award is not related to investment performance.

Third party rankings and recognition from rating services are no guarantee of future investment success.