WEALTH WITH PURPOSE®

For the high-net-worth, the traditional model of financial services is broken. Conflicts of interest, ineffective advisor collaboration, and a focus on selling products, have often prevented clients from receiving the best guidance. AltruVista provides an alternative model; uniquely catered to business owners and family wealth.

WE UNDERSTAND YOUR BEST INVESTMENT IS YOUR BUSINESS

Many see a wealth-planning firm as a manager of liquid investments. We find that the most valuable assets of entrepreneurs are their business and their vision.

Our process caters to this notion; and provides support to all areas of planning, including both illiquid and liquid assets.

WE UNDERSTAND THAT YOUR GREATEST LOVE IS YOUR FAMILY

One of the biggest concerns for any business owner is the financial security of their loved ones. However, what may be equally important, and often overlooked, is the effective succession of their wealth to their loved ones. How will the next generation receive and meaningfully benefit from your legacy? Are you passing on your vision and values? What is your family model for effective continuity? Who will see the plan through completion?

When someone is referred to AltruVista they have already accomplished significant success. They usually have several plans already in place and have trusted advisors on whom they lean for guidance. The challenge is that they are in need of something that they are unaware exists; an integrated process that brings alignment between their goals, their plans, their advisors, and their family.

WE REPRESENT YOU AND YOUR INTERESTS, NOT A FINANCIAL INSTITUTION AND THEIR PRODUCTS

For the high-net-worth, you should never settle for anything less than a fiduciary model. If your advisor does not represent you, the collateral effect can be enormous. Independence and objectivity are cornerstones behind successful client experiences.

AltruVista_Planning-High-Net-Worth
from **AltruVista**

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Planning For The High-Net-Worth

Traditional wealth-planning is often segmented, with multiple advisors providing services independent of one another. Although the advisors may have the client's best interests at heart, gaps can often exist between plans and strategies. Our Wealth With Purpose® planning process is designed to integrate those advisors to ensure alignment with your plan.

ALL VIDEOS

Download Our Guide For High-Net-Worth Business Owners And Families

The latest guidebook from AltruVista, **Choosing a Financial Advisor**, is now available.

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AltruVista is credentialed by the Certified Financial Planner Board of Standards, Inc., the recognized standard of excellence for

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