Welcome to a firm where your personal values, life goals and gifting aspirations are at the center of our services.

Allium Financial Advisors provides an independent, integrated approach to private wealth management. We are a multi-family office serving a diverse range of families, each with a custom set of needs. Family foundations and non-profit organizations also benefit from our custom service approach.

Life has layers. We take the time to fully understand what is important to you, your current financial structure and personal goals. The result of our work is a personalized living financial plan and customized long-term investment strategy to help you manage and grow your wealth with clarity and confidence.

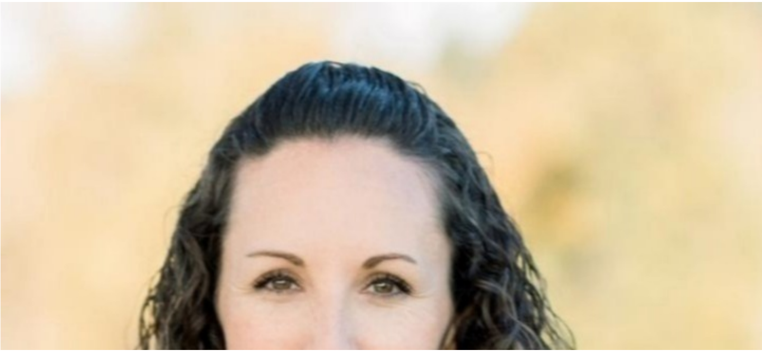
We believe in proactive, tax efficient, cost effective, diversified investing. In addition to the traditional markets, our clients have exclusive, negotiated access to a wide range of carefully selected top-tier professionals in the areas of tax and accounting, legal, insurance, and trustee services provides a comprehensive, integrated suite of services.

We invite you to discover the benefits of holistic, integrated wealth management.

Meet The Team

Sheree Demers Arntson CTFA®

Pradeep Tempalli CFA, CFP®



Jamie McCreary CFP®

Stephanie Fagerstrom

The behind-the-scenes team

Allium carefully selects professional, independent partners to provide high quality back office support. We only use service providers that have extensive experience in managing the operations of independent investment advisory firms. By outsourcing back office functions, we are able to remain highly accessible to our clients and focus our energy and time on their needs. Outsourcing to the experts ensures we use leading, integrated technology with excellent security measures, operate with the highest of compliance standards and have access to superior, independent analytics and research.

STACY SIZEMORE

Chief Compliance Officer

compliance@alliumfinancial.com

A Comprehensive Approach

At Allium, we believe in a comprehensive approach to wealth management. Creating a Financial Plan and personalized investment strategy overseen by a collaborative team of professionals enables you to make informed decisions with confidence.

A Financial Plan is a thought out, coordinated approach to managing your wealth in a way that can best meet your goals. It includes an estate structure, insurance coverage, savings strategy (or spending strategy, depending on your stage of life), investment strategy and gifting plan designed specifically for you.

GETTING STARTED

You will be introduced to **Trellis**; our secure, online wealth management tool that provides structure, transparency, daily valuation and organization to your finances and investments. Our financial planning work is done in Trellis and can be reviewed, revised and updated at any time with current asset values.

TAKING ACTION

Once your goals are identified and your initial **financial planning** process completed, you are provided recommendations and suggested action items. We assist you in the implementation and coordinate with professionals such as your estate planning attorney, mortgage broker, insurance broker and tax advisor.

BUILDING AN INVESTMENT PORTFOLIO YOU CAN RELY ON

The next step is to review your investments, determine a personalized investment strategy and create an implementation plan.

Allium practices proactive **portfolio management**. We pay close attention to market cycles, special opportunities, rotation in investment strategies, interest rate movement and the evolving

Needs change, life can become more complex, opportunities arise, and goals may be reset. At Allium, financial planning and portfolio management are active, continual aspects of our service. We help you prepare for the future with intention.

Non-Profit Organizations

Donors invest in your organization because they believe and trust in your mission. You can also have an investment portfolio that supports and reflects your mission.

We build investment portfolios that reflect and take into consideration our clients' ethics and values. We know how important this is – not only to your generous donors but also your staff and those you serve.

DO YOU HAVE TO COMPROMISE LONG-TERM RETURN POTENTIAL?

Definitely not. Your return potential does not need to be compromised to reflect your mission. Asset allocation has been the primary driver of long-term returns. Diversification can assist in risk management. Active management in inefficient asset classes and the use of alternative investment strategies can provide additional return potential and risk management benefits.

IS YOUR SPENDING POLICY SUSTAINABLE?

Long-term market returns have steadily declined over the last several decades, placing pressure on many organizations' spending rates. Our financial analysis expertise can assist in developing and/or

SUPPORTING YOUR BEST PRACTICES IN THE STEWARDSHIP OF YOUR ORGANIZATION'S ASSETS

It is important that every board and committee member of your organization has a clear understanding of their fiduciary responsibilities. Fiduciary education is a prudent requirement for each incoming member, and we can assist in this effort.

Services include:

- Investment policy development and regular review
- Asset allocation studies based on current forward-looking risk and return assumptions
- Spending policy analysis, development and regular review
- Proactive, customized, cost effective portfolio management
- Fiduciary education
- Customized donor communication materials regarding the growth and management of your investment portfolio

We will assist in any way we can to help support and further your mission.

Call | Fax 877 487 6860 | 15350 SW Sequoia Parkway | Suite 250 | Portland, OR 97224

Allium
FINANCIAL ADVISORS