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Digital Services

## Our Philosophy



### VALUES

Each principal at Elevate Wealth Management works to add value to your portfolio. We are passionate about this, providing you with the integrity and objective advice you need. Let us help you raise your wealth to new levels.



### PERSPECTIVE

Elevate Wealth and Lacey Buteyn bring unprecedented energy and a fresh perspective to the financial services industry. Elevate Wealth reclaims the resources of Wall Street while providing its clients with a Main Street ethic of service.



## PASSION

“My passion is client care. The support services and broad spectrum of investment products that Elevate Wealth Management offers is exactly what I believe my clients need.” ~ Lacey Buteyn, CFP® CIMA®, Wealth Management Advisor

Let us help you elevate your wealth to new levels.



PORTFOLIO ASSESSMENT

A proactive approach is key to navigating tumultuous markets. We provide strategic game plans grounded in the basic economic concept of supply and demand. Be prepared to play both offense and defense by exercising dynamic asset-level investing in domestic and international equities, fixed-income funds, alternative investments, and most importantly, employing cash.



## FINANCIAL PLANNING

As a professional CERTIFIED FINANCIAL PLANNER™, Lacey Buteyn develops a one-on-one relationship with each client to fully evaluate that client's financial goals and dreams. Each client receives professional advice tailored to his or her specific needs and situation. As a trusted advisor, Lacey takes pride in guiding her clients on their financial journey.



## TRUSTED PARTNER

Lacey brings unprecedented energy and a fresh perspective to the financial services industry. She serves the needs of her clients and their communities with passion and integrity. She works with an extensive group of diverse clients, managing their wealth and coordinating comprehensive financial futures for them and their families for almost twenty years.

# Are you on a path to the financial future you want?

Here are some hints that will help you on your path.



## 1 Save for the Future

THE STEPS YOU TAKE NOW WILL AFFECT YOU THE REST OF YOUR LIFE.

Retirement is expensive. Experts estimate that you will need at least 70 percent of your pre-retirement income just to maintain your standard of living when you retire. Take charge of your financial future. The key to a secure retirement is to plan ahead.



## 2 Educate Yourself

WHAT IS THE FOUNDATION OF YOUR FINANCIAL DECISIONS?

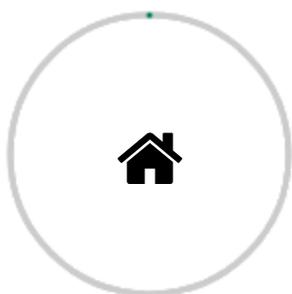
The first step to using money intelligently is to understand how you feel about it. When you have a better understanding of your life values—be they inner, social, physical, or financial—you can better understand your priorities and goals, and how they affect your financial decisions.



## 3 Seek out Expert Advice

WE ARE HERE TO HELP YOU MAKE BETTER FINANCIAL DECISIONS.

Becoming a smarter manager of your money requires that you know, or can obtain, detailed information about your financial situation. If that information is not at your fingertips, you need to collect it and create a filing system to keep it organized.



## 4 Set Goals and Stick to Them

IT IS EASY TO GET SIDETRACKED WHEN IT COMES TO MONEY.

Perhaps you'd like to take a vacation next summer. Or, maybe you hope to go back to school in the next five years. Whatever your goals might be, we believe you have a better chance of achieving them if you write them down. As you list your goals, divide them into three categories: short-term, medium-term, and long-term.

No strategy ensures success or protects against a loss. Stock investing involves risk including potential loss of principal. International investing involves special risks such as currency fluctuation and political instability and may not be suitable for all investors.

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