# ALTAIR

WEALTH GUIDANCE FOR LIFE

Investment Management
Financial Planning
Client Education

# A PARTNER IN
# REALIZING YOUR VISION

## Providing Peace of Mind

Wealth can open up exciting new opportunities. It can also be a source of complexity and stress. Our goal is to simplify the complexities of wealth so that you can pursue and enjoy the opportunities it enables.

At Altair, you are not fit into prescribed solutions. Our seasoned professionals engage you in regular face-to-face dialogue to identify the right path forward given your unique situation.

As your investment and financial goals evolve, it is our responsibility to be proactive - to continuously look ahead and offer sound judgment on your wealth plans and important life events.

# YOUR ACCESS TO COMPREHENSIVE SERVICES

### Investment Management

The technical aspects in structuring and implementing your investment portfolio – risk tolerance, time horizon, asset allocation, active and passive manager selection, tax impact, return assumptions and reporting needs – are determined by the personal objectives you are looking to achieve. We work closely with you to thoughtfully craft a portfolio that meets your lifestyle needs today and for the long term.

### Financial Planning

Reaching your wealth goals depends on the ongoing management and successful integration of many moving parts. Whether providing an evaluation of your estate plans, determining the best strategy for maximizing compensation benefits, sharing our advice on diversifying from a concentrated position or helping you to plan for education funding or retirement, we provide the data and guidance needed for you to feel confident in your financial decisions.

### Client Education

The complexities of wealth extend far beyond financial issues. Significant assets can complicate family relationships, introduce a daunting array of options and heighten concerns about the responsibilities of wealth. To address these issues, we provide educational seminars, publications and professional research throughout the year as well as one-on-one support for specific client needs.

# OBJECTIVE ADVICE
# FROM A FIDUCIARY

### Focused On Your Needs, Responsive to Your Concerns

The foundation of any relationship is trust. As a registered investment adviser, we owe a fiduciary standard of care to our clients, meaning it is our job and our legal mandate to act for the sole benefit and interests of our clients. Our obligation is to provide objective advice and identify customized solutions that reflect all aspects of your financial life.

Our fiduciary commitment influences every aspect of the firm's infrastructure. We do not accept commissions or share revenue of any kind with the investment managers we recommend, nor do we sell investment products. Altair's fee-only compensation model provides you with peace of mind that you are being served, not sold to, and provides our professionals with the highest level of personal integrity in their work.


# ONGOING DISCIPLINE TO IDENTIFY RISKS AND OPPORTUNITIES

## Integrated Planning with Your Other Trusted Advisers

Life is hectic and the personal and professional demands on your time make it easy to delay investment and financial decisions. It can be difficult and time- consuming to gather the critical information needed to effectively evaluate your full financial picture and manage all the components. Our job is to shoulder this responsibility for you.

As an Altair client, you are provided with a disciplined structure to ensure your wealth planning remains relevant and current. We have the depth and breadth of experience to sort through the planning considerations, risk exposures and investment options to help you reach your long-term goals.

To assure an integrated and comprehensive approach to your wealth planning, we work in close collaboration with your attorney, accountant and other professional advisers. This provides a system of checks and balances and enables your full advisory team to better spot issues and identify opportunities that may be to your benefit.

# A PRIVATE FIRM BUILT
# FOR YOUR NEEDS

## Guidance from Professionals Who Know You Well

The sale or acquisition of a business, birth of a child, retirement, changes in health, divorce or death of a family member – these are the events where you require an advocate to listen, reflect and provide expert guidance as you enter a new phase of life.

As an Altair client, you have direct access to the firm's partners and decision makers and you are provided with a level of personalization that is the hallmark of a private firm. Our leadership team includes CPAs, attorneys, bankers, CFAs and CFPs who are cross-trained in a wide range of financial planning disciplines, enabling us to provide insight and help you evaluate important life decisions.

We maintain a carefully structured client-to-adviser ratio in order to exceed your ongoing needs and expectations and to have the capacity to be responsive when unexpected events occur. With an intimate client base and low staff turnover, you are served for the long term by professionals who know your situation well.

We invite you to come in and meet with us. There is no better way to get to know one another.

“

*Talk me through all my executive compensation options. What should I consider in this decision?*

*How do we choose a trustee given some of the special needs in our family?*

*What are the best options for leaving a vacation property to our adult children?*

*How should we plan for the future care needs of my elderly parents?*

*Why would a donor-advised fund be a good option for introducing philanthropic decision-making with our teenagers?*

”

ALTAIR

WEALTH GUIDANCE FOR LIFE

Our firm name and logo represent one of the brightest stars in the summer sky. They are symbolic of our founding belief in guiding clients to a bright and successful future.

**Altair Advisers LLC**
303 West Madison Street, Suite 600
Chicago, Illinois 60606 | 312.429.3000 | altairadvisers.com