



True Wealth Advisory Group

Dearest Friends,

Today marks the beginning of an exciting new chapter for us. We are proud to announce the launch of True Wealth Advisory Group.

Please know that we would have preferred to share this news sooner, but were not legally permitted to do so.

We absolutely believe our new practice, True Wealth Advisory Group, will give us the control and flexibility necessary to deliver the best possible ultra-high-net-worth client experience.

Over time, it became clear to us that we wanted to enhance our ability to serve our clients in a manner that is focused exclusively on their needs and interests.

We felt that in order to uphold our core belief of acting as true fiduciaries, we needed to pursue a new model and structure without compromising our ability to provide sophisticated planning advice, portfolio management and an impeccable service experience.

After a rigorous due diligence process, we can tell you with the utmost confidence that we have found this in two firms: HighTower and Fidelity.

We selected HighTower as our strategic partner and supportive platform because it was built upon founding principles that put clients' interests first: the true fiduciary standard.

HighTower has grown rapidly since its inception, and currently has more than 87 elite financial advisory practices, like True Wealth Advisory Group, who oversee approximately \$50 billion in client assets.

The firm provides access to a wide array of sophisticated, quality resources and solutions from third-party providers. This will allow our team to build and implement tailored, goals-based wealth management strategies.

Securities offered through HighTower Securities, LLC | Member FINRA/SIPC/MSRB
HighTower Advisors, LLC is a SEC registered investment advisor.

TRUEWEALTHADVISORYGROUP.COM



True Wealth Advisory Group

HighTower does not manufacture any products or services, nor do they benefit from the selection of any particular investment solution. Importantly, there are no mark-ups, profit centers or sales requirements of any bank or firm's proprietary products.

Additionally, all client assets are held at independent, third-party custodians, helping to further eliminate potential conflicts of interest.

We have chosen Fidelity as our primary asset custodian. Fidelity holds more than \$6.2 trillion in assets, and their long history of providing asset safety, client service, trading and technology support aligns with our values.

Asset security and service experience are paramount; accordingly, we are confident that Fidelity will fulfill our high standards.

We want to assure you that we are available at any time to discuss this change. Please do not hesitate to contact us.

In closing, we want to express our deep gratitude for our relationship with each of you, as well as for your trust and confidence.

Warmest Regards,

Marc Shachtman
Founder and CEO

Monica Izquierdo
Director of Client Relations and Operations

Securities offered through HighTower Securities, LLC | Member FINRA/SIPC/MSRB
HighTower Advisors, LLC is a SEC registered investment advisor.

TRUEWEALTHADVISORYGROUP.COM