Alignment by ThirtyNorth

Alignment by ThirtyNorth is a coordinated wealth management offering for individuals and families facing greater financial complexity or shared responsibility. It exists alongside investment management as one of two ways clients may engage with ThirtyNorth. ***Alignment builds on disciplined investment management and adds alignment across tax, estate, and planning considerations, as needed***. Investment management remains the foundation. Alignment is flexible and not required for every client. It is used when coordination adds clarity, reduces friction, and helps decisions stay aligned over time.

Alignment is designed for clients navigating:

- Growth
- Transition
- Shared decision-making

ALIGNMENT BY THIRTYNORTH

Alignment by ThirtyNorth Framework:

1. ***Ask What Matters:*** Every relationship begins with understanding goals, values, priorities, and responsibilities. This context guides every investment and planning decision.

2. ***Lay Out the Full Financial Landscape:*** We bring the entire financial picture into view. Investments, taxes, estate considerations, insurance, cash flow, and group dynamics. No silos. No blind spots.

3. ***Integrate the Advisor Network:*** We coordinate as needed across tax, legal, insurance, and other professionals so advice is aligned and decisions support the overall investment strategy.

4. ***Guide a Strategy You Can Trust:*** With clarity in place, we design and manage a long-term investment strategy grounded in experience, risk awareness, and real-world complexity.

5. ***Navigate Change With Intention:*** Life evolves. Markets change. We monitor, refine, and adjust with purpose so everything stays aligned over time.