The advisor you trust for today's needs and tomorrow's goals.

RED MOUNTAIN
FINANCIAL PARTNERS

"Our clients value a partner they can trust to lead them confidently along the path toward their goals." –Michael Warren

WE DO WHAT'S RIGHT FOR OUR CLIENTS — NOT WHAT'S EASIEST

At Red Mountain Financial Partners, our independent wealth advisors are committed to developing long-term relationships that place client interests first. We take the time to get to know you, learn what you want to accomplish, and develop strategies tailored to your needs and goals to protect your lifestyle now and throughout retirement. Based on your needs, we will educate you on your financial situation and the opportunities available to you, and bring clarity to even your most complex financial challenges in these and other areas:

- Investment Management
- Retirement Planning
- Financial Planning
- College Planning
- Estate Planning

OUR PHILOSOPHY CENTERS ON SIMPLE, STRAIGHTFORWARD GUIDANCE

SIMPLE - "Simple" is not the same as easy. Our goal is to simplify your financial life through developing personalized financial and investment strategies that consider all aspects of your finances, wealth management needs, lifestyle, and goals. That's a complex process that requires significant experience, insight and education.

STRAIGHTFORWARD - While it takes more work to customize a strategy tailored to your needs, that's what our clients hire us to do. Our straightforward approach to helping improve the lives of our clients begins with understanding and embraces proactive planning, technical and fundamental market analysis and monitoring, education and ongoing communication.

GUIDANCE - We offer fee-based asset management, which we believe places the financial emphasis where it belongs: on ensuring your interests always come first. A fee-based approach to asset management helps to ensure we always have a vested interest in helping you pursue your goals and objectives as we help you protect and grow your wealth over time.

CUSTOMIZED INVESTMENT PROCESS

At Red Mountain Financial Partners, our goal is to bring clarity and simplicity to a complex process. We believe that working with the right partner, one who shares your values and works with you in a collaborative manner, is the key to turning a potentially daunting process into an enjoyable partnership centered on your needs and goals. Our customized investment process seeks to create individualized asset allocations based on each client's goals, risk tolerance, time horizon and liquidity needs. It begins with an initial meeting where we will:

- Get to know you and discuss your hopes, dreams and life goals
- Learn about your past investment experience and determine your risk tolerance
- Discuss your liquidity needs and time horizon

In our second meeting, we will present one of our Customized Investment Solutions to help meet the specific needs discussed in our initial meeting. We will go over each position and explain our strategy in depth.

THE RED MOUNTAIN FINANCIAL PARTNERS DIFFERENCE

Objective, Unbiased Advice - As independent advisors, we have no proprietary products, sales quotas or sales goals, which eliminates conflicts of interest and helps to ensure that all decisions are based on furthering your financial well-being.

Portfolio Stress Testing - We use sophisticated risk analysis software to stress test recommended strategies, help pinpoint your tolerance for risk and identify your optimal risk/return ratio aligned with your life goals and needs. We believe that portfolio stress testing is a critical element in helping you to protect and grow your wealth. Stress testing not only enables us to better understand and manage portfolio risk, but helps us to determine how your portfolio may react to different financial conditions or economic scenarios.

Independent Research - As independent advisors we utilize independent research from multiple industry-leading sources as we seek to provide you with timely, objective, and unbiased financial and investment advice.

Customized Investment Portfolios - The investment portfolios we develop for our clients draw from a broad universe of non-proprietary investment products, including institutionally managed funds, exchange traded funds (ETFs), individual stocks and bonds, alternative investments, and more.*

*Alternative Investment Strategies include hedge fund strategies, private equity, managed futures vehicles, structured products, equipment leasing partnerships, real estate investment trusts (REITs), 1031 real estate exchanges and oil and gas partnerships. No strategy ensures a profit or protects against loss. Investing involves risk including possible loss of principal. Tactical allocation may involve more frequent buying and selling of assets and will tend to general higher transaction cost. Investors should consider the tax consequences of moving positions more frequently.

As a Chartered Market Technician® (CMT®), firm president Michael Warren brings more than two decades of experience developing customized investment portfolios tailored to each client's needs and goals with a strong focus on managing risk.

"We place great value on our experienced team, coveted client relationships, and our reputation as trusted advisors. While it would be hard to replace any of these, the loss of our reputation would be the most difficult to restore."
–Michael Warren

OUR CORE VALUES

TRUST - We believe it's critical to earn your trust and confidence as we help you make the decisions that are right for you, your family or your business throughout your financial journey. We place great emphasis on maintaining our reputation for acting with honesty and integrity, and adhering to high industry standards.

ADVOCACY - Our focus is on partnering with you as a competent advocate and guide, helping to protect and grow your wealth through implementing customized investment strategies aligned with your needs and values. We provide access to extensive resources, including industry-leading technology, independent research, top institutional investment managers, and a full universe of non-proprietary investment products and services.

UNDERSTANDING - We believe the financial and investment planning process should be about people working together in a collaborative manner that enables confidence, not confusion. Understanding what matters most to you is critical to developing customized strategies that seek to meet even your most complex needs.

OUR COMMITMENT TO YOU

As a Red Mountain Financial Partners client, you can rely on us to:

- Treat you, your goals and your financial assets with genuine respect.
- Honor our commitments to confidentiality, integrity and objectivity throughout the wealth management process.
- Use our knowledge, experience, insight and resources to further your goals and interests.
- Provide straightforward and personalized strategies that support your goals and make sense to you.
- Foster relationships built on trust, transparency and honesty.
- Proactively communicate with you and respond to your inquiries in a timely and friendly manner.
- Listen to you, and be honest in our replies, even if it means you won't always like what we say.

We are proud to work with multiple generations of our clients who rely on us for objective advice and guidance along the path to pursuing their goals. It would be our pleasure to do the same for you and your family. Contact us today to schedule a no-obligation consultation to determine if we're the right fit for your investment planning needs.

Independence Powered by LPL Financial

Red Mountain Financial Partners is supported by the resources of LPL Financial, the nation's largest independent broker/dealer.* This relationship provides us with access to unbiased research and a comprehensive array of tools, resources and technology. As an independent firm with no proprietary products to sell or sales quotas to meet, we are able to offer you objective financial guidance and investment recommendations.

Red Mountain
Financial Partners

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