ALIGN WEALTH MANAGEMENT AT A GLANCE

ALIGN wealth management
CLIENT FOCUSED. PERIOD.

FOUNDED

1993

SERVING

INDIVIDUAL INVESTORS AND FAMILIES WITH $750,000 OR MORE

YOUR TEAM

BRIAN PUCKETT, JD, CPA/PFS
CERTIFIED FINANCIAL PLANNER™

DENNIS PACKARD
CERTIFIED FINANCIAL PLANNER™

KEVIN BROWN
CERTIFIED FINANCIAL PLANNER™

DARLENE EISEL
CLIENT SERVICE MANAGER

DEBBIE STANLEY
CLIENT SERVICE ASSOCIATE

LOCATIONS

2

OKLAHOMA CITY

ST. PETERSBURG

ASSETS UNDER MGMT

$438 MILLION

AS OF DECEMBER 31, 2021

SPECIALTIES

PRE-RETIREES OVER AGE 50

RETIREES

BUSINESS OWNERS

MISSION

Align is an independent fiduciary wealth management firm that helps successful people like you keep and grow your wealth. Our process combines decades of financial science with customized financial planning. We strive to deliver peace of mind by helping you make the most of your one financial life.

We are Client Focused. Period.™

SERVICES

WEALTH MANAGEMENT

FINANCIAL PLANNING

INVESTMENT MANAGEMENT

SUSTAINABLE INVESTING

TAX PLANNING

RETIREMENT PLANNING

LEGACY PLANNING

CHARITABLE GIVING

COLLEGE PLANNING

401(K) PLANS

KEY QUALITIES

WE ARE:
An independent, fee-only, fiduciary Registered Investment Advisor firm. We work only for you. We are Client Focused. Period.

YOUR CLIENT EXPERIENCE IS:
High-touch, far-reaching, and deeply personalized

Through planning, process, and collaboration, we've got you covered. Many investors end up taking too much risk for too little return, receiving mediocre service and conflicted "advice," and paying too much in taxes, commissions, and fees. We solve these problems. It's who we are. It's what we do.

YOUR INVESTMENTS ARE:
Low-cost, globally diversified, evidence-based

Our process combines decades of financial science with customized financial planning to help you make the most of your one financial life.

KEY ALLIANCES

FUND MANAGERS

Our select fund manager alliances help us consistently apply your ideal investment strategy.

Dimensional Vanguard®

YOUR MONEY IS HELD AT

Your assets are held independently, with transparent transaction reports sent directly to you.

CHARLES SCHWAB TD Ameritrade Institutional

ALSO AFFILIATED WITH

Additional professional affiliations ensure we gain from, and contribute to best financial advisory practices: advancing transparent, low-cost, strictly fiduciary levels of client care.

NAPFA Corporate Firm

Proud member of:

WEALTH ADVISOR ALLIANCE

Founded by Forum Financial Management, LP, the Wealth Advisor Alliance is a network of independent advisors like Align, offering a deep, multidisciplinary bench of professional financial management, including: portfolio design, retirement, estate, insurance, and tax planning.

Disclosure: Investment Advisory Services offered through Align Wealth Management, a Federally Registered Investment Advisor. Additional information about Align Wealth Management, LLC is also available on the SEC's website at www.adviserinfo.sec.gov. The searchable IARD/CRD number for Align Wealth Management, LLC is 131482. Our firm's ADV disclosure brochures are available upon request as is our Form CRS Client Relationship Summary.

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