# AT-A-GLANCE

### A Team of Five Professionals

- 100 years of collective experience
- Designations including CFP® and CIMA®
- Unique mix of Veterans, Parents, Motorcyle & Car Enthusiasts, Outdoorsmen, and Volunteers.

# OUR TEAM

**Allen B. Lorenzi, CIMA®**
Wealth Advisor - Partner

**Ira M. Shapiro**
Wealth Advisor - Partner

**Michael J. Walker, CFP®**
Partner; Wealth Strategist, Financial Planner

**Deborah K. Perea**
Operations Manager

**Jordan Bunker**
Administrative Assistant

# CONTACT

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## MISSION

At Raintree Wealth Partners, our top priority is to deeply understand your unique financial needs, aspirations, and long-term goals. From our perspective as your personal financial concierge, we endeavor to offer every client a clear vision of their financial future, and the confidence that comes from having a plan to turn dreams into reality.

## WHO WE SERVE

With a seasoned and experienced team behind you, you can be confident that your wealth is in good hands. With a growing and diverse group of clients throughout Arizona and the South West, we're exceptionally well prepared to handle the unique needs of:

- **Successful professionals** in that critical time 10 to 15 years prior to retirement
- **Business owners** looking to chart a path toward personal financial freedom
- **Retirees** with concerns over ensuring their wealth is preserved and protected

## WHAT MAKES US DIFFERENT

Our People: When you entrust your financial future to Raintree Wealth Partners, you can sleep better knowing your financial future in in the capable hands of a team of highly-skilled, experienced professionals that will treat you like one of the family.

Our Service: Although financial markets can ebb and flow, the service you will experience at Raintree Wealth Partners will never vary. Our Firm has grown exponentially over the years because of the upmost importance we place on providing our valued client's with world-class service. At Raintree, our clients come first. *ALWAYS!*

Our Approach: Drawing from our collective 100 years of experience, we know the importance of having a disciplined, repeatable process. As a Fiduciary, our unique approach to portfolio construction blended with appropriate risk management is designed specifically with your individual goals in mind.

## OUR COMMITMENT TO COMMUNICATION AND SERVICE

At Raintree Wealth Partners, we believe communication is key. Scheduled outreach includes regular reviews, and check-ins. You can also count on a swift response within 24 hours whenever you contact us with a question or concern.

## SERVICES WE ADVISE ON

We provide customized solutions tailored to the needs of your family:

- Goal-Based Planning
- Portfolio Management
- Financial Preparedness Review
- Trust and Estate Planning
- Debt Management & Customized Lending
- Tax Strategies & Planning
- Family Protection & Insurance
- Tax Minimization
- Retirement Planning
- Philanthropy
- Risk Management & Asset Protection
- Coordination with other trusted advisors

## COMPREHENSIVE PLANNING FOR THE ENTIRE FAMILY

Each individual, family, or business has a different set of goals and priorities for what they want their money and finances to accomplish. At Raintree Wealth Partners, we offer customized investment advice and guidance, along with services that are designed to simplify your life.


RAINTREE WEALTH PARTNERS

Experience Driven Solutions