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# Real People Working to Help Deliver Clarity in Retirement Planning

*Altitude Wealth Management, LLC*

**H**aley Sanders, president of Altitude Wealth Management, says her passion for helping regular folks prepare for retirement started during her childhood while watching her father during summer stints as an office gofer at the advisory firm he founded.

“I saw the impact he made in people’s lives,” she said. “I wanted to do that, too. So I took over the firm to continue the work he started to help clients prepare for this important phase of life.”

*“We’re real people you can trust to be in your corner when you need us.”*

– Haley Sanders

Today, Altitude Wealth Management offers a comprehensive approach to financial planning for pre-retiree and retiree clients. This includes careful strategies for Social Security income, investment income, estate planning and taxes. Sanders understands talking about money is difficult for many people.

“We do a lot of listening,” she says. “Then, we take an educational approach and explain our processes and strategies. When clients come to us, many of them are at turning points in their lives. We want to help guide them through the decisions that will bring them peace of mind.”

As a woman in a field dominated by men, Sanders says she takes a special



Haley Sanders

interest in the needs of single women as they approach retirement. Many have limited experience handling money issues for their household and feel overwhelmed with tackling all the steps to build a solid retirement plan on their own.

“It is definitely possible to get taken advantage of if you lack the proper knowledge,” she says. “That’s why we are committed to fiduciary services and to providing education wherever needed to bring clarity and transparency to a complex industry.”

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The firm is still a family business, as Sanders works with her husband, Jonathan Sanders, who handles income and insurance planning. Together they have helped multiple generations of families plan for the big financial decisions that impact their futures. Some clients today are the grandchildren of individuals who started investing with her father years ago.

“That’s very rewarding, to have seen my dad start with a family whose younger generations I’m still working with today,” she says.

## Starting From the Bottom and Rising to the Top

Sanders may have begun her career running errands and making coffee, but she is a grown-up professional woman today who teaches seminars all over the region about what to expect as you enter retirement and how to handle questions about Social Security, retirement income and taxes.

Throughout all the difficult conversations about money, Sanders says she and her husband always keep in mind real people are behind the numbers.

“Having lots of money doesn’t guarantee happiness,” she says. “But having a sound financial plan does bring a sense of security, and that brings peace of mind. We understand how important that is.”



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