SMALL TOWN SERVICE, WITH BIG TIME RESOURCES

At the heart of our practice lies a commitment to the values and culture that have been the cornerstone of D.A. Davidson & Co. since its inception. Our team is proud to be an integral part of a company whose principles are deeply embedded in its people and history. Founded in 1935 in Great Falls, Montana, D.A. Davidson has always prioritized serving and supporting our communities. This enduring dedication ensures that our clients' needs are paramount. The unwavering focus on client-first service is a testament to the enduring ethos of our firm. As our firm has expanded its reach and resources, our core values have steadfastly guided our growth. These principles, established at the very beginning, continue to lead our actions and decisions.

D.A. Davidson's Wealth Management Marketing Specialist Elizabeth Coll shares a perspective that captures the essence of our company's values and culture:

> "Not only is the bison our country's official mammal, but it is also D.A. Davidson's logo, mascot, talisman...The bison symbolizes culture, tradition, resourcefulness, and resilience. One characteristic that many may not know is that the bison will head into a snowstorm rather than drifting with the wind. Why? These creatures instinctively know that walking into the storm will get them out of the commotion sooner. Let that sink in for a moment. Bison do not run. They face the storm head on.
>
> A fundamental aspect of the human experience is to encounter difficulties throughout one's life. During life's highs and lows, our true character is revealed in times of adversity. It is our natural instinct to fight, flee, or freeze in moments of uncertainty. Like the bison, our firm navigates financial storms with resilience and unfailing instinct. We admire the qualities of the bison and even incorporate them to our everyday lives and the work we do here at D.A. Davidson, especially in times of uncertainty."

**CFP Board owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™, and CFP® (with plaque design) in the U.S.*

If you're seeking to alleviate stress, enhance the quality and enjoyment of your daily life, or wish to be well-prepared for future challenges, we invite you to consider us as your reliable ally. Your interest in our firm and team is highly valued, and we look forward to the opportunity to meet with you and yours.

Bitterroot Wealth Planning
bitterrootwealthplanning.com

D|A|DAVIDSON

Bitterroot Wealth Planning

Advisors with D.A. Davidson & Co. member SIPC

GO BEYOND JUST INVESTING

Investment planning is only one aspect of the advice we provide our clients. With our team of CERTIFIED FINANCIAL PLANNER™ professionals, Jim and Trevor, our primary mission is to educate on, facilitate the creation of, and navigate the execution of a plan to provide balance and guidance through your life. We understand life changes in the blink of an eye, and we want to be there to help you navigate whatever may happen. We deliver this balance and navigation through your life by utilizing a disciplined goals-based planning process.

SERVICE FOCUS

What does service mean to us? It's not just something we say or write; it's an experience we hope you feel and enjoy with your every interaction with us. Service from us means we are here when you stop by, we answer the phone when you call, we get back to you timely if you leave a message, we get to know who you are, we work for you to ease the process and take a load off your shoulders, and we do it instinctively.
Because we care.

THE STRENGTH OF ADVICE®

We loved when our company took this on as their corporate slogan because while everyone gives advice, it's the strength of the advice that matters. A quick internet or artificial intelligence search will provide you with endless advice. The strength of our advice leans on years of experience and the achievement of higher education and standards required by our credentials. Both our advisors hold the CERTIFIED FINANCIAL PLANNER™ and Certified Wealth Strategist® marks.

YOUR TEAM

Our team approach is a differentiator. We believe in this day and age, everyone should be working with a team of financial professionals. The benefits are extensive, including diversity and range of knowledge, experience and viewpoints, which provides a more well-rounded approach and perspective to investing, as well as the benefit of a level of redundancy and continuity to your financial care. In the event one CFP® professional is unavailable, another team member can step in and provide the same level of service, reducing disruptions and increasing availability of assistance. Our whole team is dedicated to working with individuals and families to create personalized financial plans that align with your goals and circumstances.

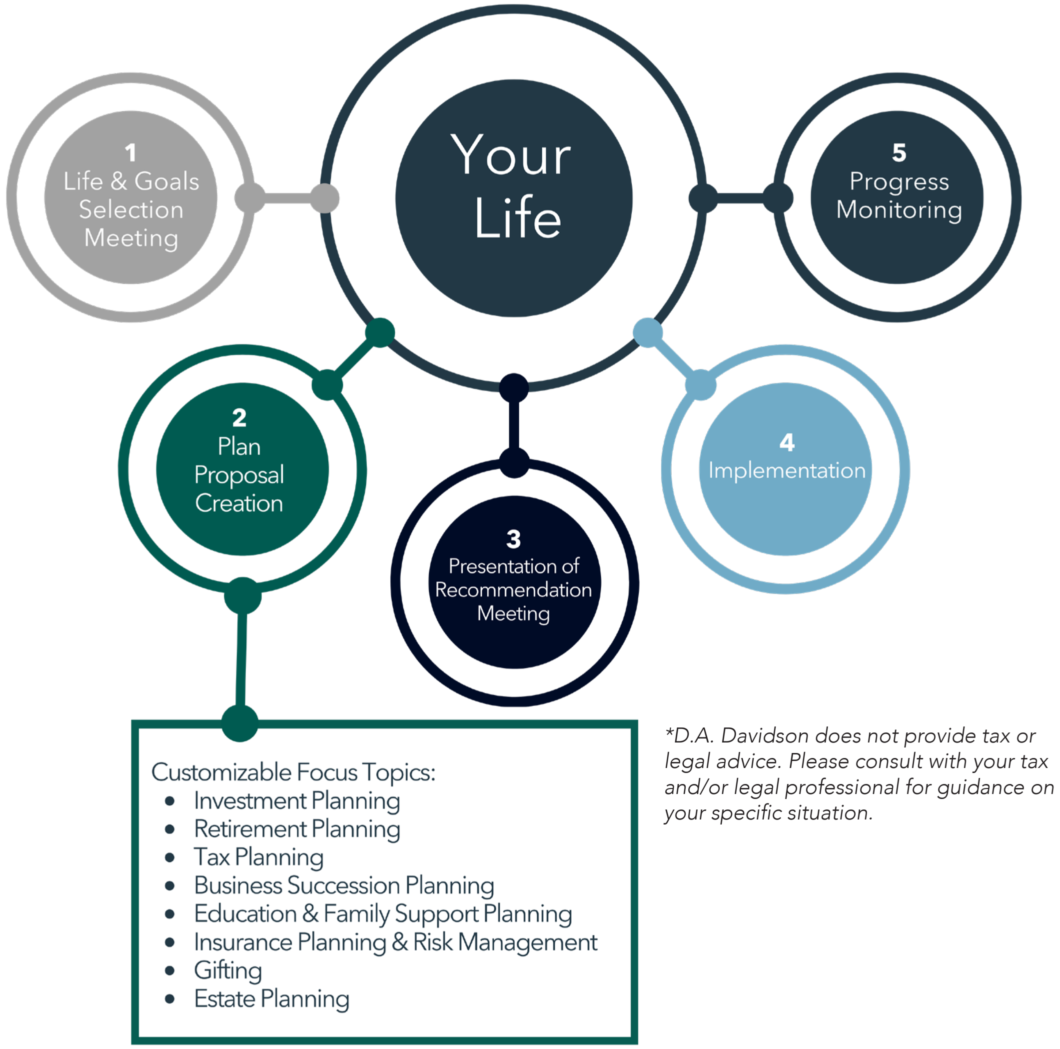
Trevor Morton, CFP®, CWS®, Financial Advisor
Jim Moerkerke, CFP®, CWS®, Senior Vice President, Financial Advisor

YOUR LIFE = THE CENTER OF OUR PROCESS

We believe it is important to help you find your financial balance between saving for future goals and enjoying life in the moment.

The key to successful financial partnership with us is open communication and a deep understanding of our clients' needs. We do this by working with you to carefully construct, implement, and monitor a wealth management plan which eases stress and frees up time, while also setting you up to meet your future goals. This approach requires us to deeply understand your needs and make sure we take the time to educate you on available options, so you feel comfortable with the plan.

The individualized plans we build focus on the accumulation phase as well as the distribution phase of your financial journey, so no matter what phase of life you are in, we are here to help.



**D.A. Davidson does not provide tax or legal advice. Please consult with your tax and/or legal professional for guidance on your specific situation.*

Questions?
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