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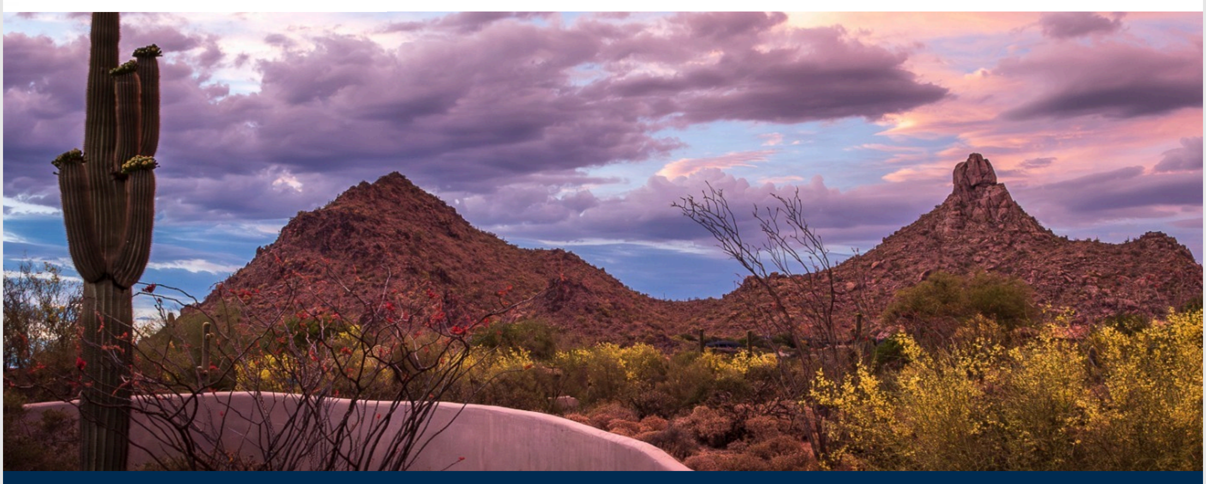

Pinnacle View Wealth Management
Q2 Newsletter 2025

We are pleased to present our quarterly newsletter to you.

This month's team member spotlight is on our Financial Planning Analyst, **Alison Smith**. Further inside, you'll also find suggestions for the warmer season ahead. If you have any questions, don't hesitate to reach out to the team.

Team Spotlight: Alison Smith

My Role on the Team:
Financial Planning Analyst

I'm a key member of our team's planning department. Our first step is to ensure we understand our clients' goals. From there we start implementing a plan to achieve them. I am involved in several critical steps throughout the process – starting with the initial plan buildout, followed by monitoring, and communicating the progress toward those goals as our clients' situations evolve.

What makes you passionate about work?

I was drawn to a career in wealth management because it offers a unique blend of challenge and opportunity – where understanding the numbers and trends is just one part of the equation. Truly understanding the people behind those numbers is what makes the work so rewarding. I stay fulfilled day to day knowing that the work we do has a lasting impact on our clients' futures.

Hobbies & Interests:

Outside of the office, I enjoy finding ways to stay active. Some of my favorites include taking workout classes, playing pickleball, or going on a hike. Every February, my best friend and I get together for a big hike somewhere around the valley. For our tenth annual trip this year we ventured down the Grand Canyon and enjoyed some amazing views.

Family Life:

My boyfriend, Daylan, and I have been together for five years. We love to spend time hanging out with friends, playing a round of golf, or watching sports (especially during NFL season!). Having been born and raised in Arizona, I'm a Cardinals fan at heart but have been convinced to root for the Broncos if they aren't playing each other. The rest of my family lives in Tucson so I will often make a weekend trip out of visits with them.

Spring Insights & Resources

5 Ways to Spring-Clean Your Finances

A lot can pile up over a year, or just a season. Here are five tips to help you tidy up, declutter and organize your finances this spring.

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What Kind of Retiree Do You Want to Be?

Everyone has a different idea of their dream retirement. Whatever you envision, it's essential to plan ahead so that your nest egg will last.

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