



Keep Up With Fortitude

December 2024 Update

A Letter from Fortitude's Founder, Matt Walker

Dear Clients and Friends,

As we approach the end of 2024, I want to take a moment to reflect on the remarkable progress Fortitude has made this year and share some exciting developments with you. Your trust and partnership have been the driving force behind everything we've accomplished, and I'm thrilled to update you on how far we've come in such a short time.

First, 2024 marks a defining moment in Fortitude's growth. We've been recognized by 12 national publications for various awards this year.

These awards have helped solidify Fortitude as a respected player in the wealth management industry nationally and within our local markets. Recognition like this not only validates the hard work of our talented team but also reinforces our commitment to excellence.

Recognized For Excellence

Company	Recognition
CityWire	50 Growers Across America - Arizona 2024
Financial Planning	Best Places to Work in Money Management
AdvisorHub	1000 Advisors to Watch - 200 RIA's Number 18
InvestmentNews Awards	Advisor of the Year (Regional Southwest) Finalist
Wealth Management Industry Awards	Best RIA Client Initiative - Fortitude Real Estate Credit
Financial Advisor Magazine	Financial Advisor - RIA Survey & Ranking
Family Wealth Report	Rising Star Award Finalist
Ranking Arizona	Independent Investment Advisors - Number 8
AZ Business	Wealth Manager of the Year
Newsweek	America's Top Financial Advisory Firms for 2025
Five Star Professional	Five Star Wealth Manager Award
Business Intelligence Group	Executive of the Year



Our team has grown significantly, allowing us to bring even greater expertise and support to each client relationship. We've exceeded expectations in assets under management, growth of our tax practice, and expanded the number of families we have the privilege of serving. We are now approaching on managing \$1B in liquid assets and another \$2B in private assets, collectively. These milestones happened organically because each of our clients and friends in the community have stepped up to bring together people who believe in what we believe. In an age in our industry where private equity and consolidation are the primary drivers of many firms' growth, our results underscore the strength of our approach and the enduring impact of our mission to revolutionize multi-family office services.

For that, we are grateful for all of you.

Additionally, I'm proud to announce that Fortitude will be moving to a new, fully customized office space in Q1 2025. This move represents so much more than a change of address—it's a testament to our commitment to fostering a culture of collaboration and innovation, and will allow us to continue to be successful for many years to come. Every detail of our new space has been designed with our core values in mind, ensuring both our clients and team members feel supported, inspired, and welcomed from the moment they walk through the door.

Looking back on all we've achieved over the past three years, I'm incredibly excited about what lies ahead. At Fortitude, everything we do is driven by our passion to empower families, simplify complexities, and help you focus on what truly matters to you. Thank you for your continued trust and support; it remains the foundation of our success.

Wishing you and your loved ones a prosperous and meaningful year ahead.

Warm regards,



Matt Walker, CEO Fortitude Family Office



On September 5, 2024, CEO Matt Walker represented Fortitude Family Office in accepting an award at the WealthManagement.com Industry Awards in New York City.



An architectural rendering of the reception area of our new office space.

A family office
that feels like family.



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