Advisory Services

Clarity in Complexity

Looking to cut through the complexity and find a comprehensive pathway to a solid wealth plan? Today everything is complicated, from Social Security and Medicare to the endless investment options available to consumers. We get it and have spent over 22 years building a practice of experts who help our clients find the pathway that is right for them. Our teams specialize in a myriad of wealth management services including:

Financial Planning

Collaborating with you to **document your core values and prioritize your life goals,** in order to optimize your current and future resources to accomplish them. We help you plan for what is most important to you, whether that be how to efficiently accumulate assets, manage stock options and other compensation packages, save for college, plan for retirement, or strategize around other major life events.

Thought partners, collaborative problem solvers and a voice of objectivity in an increasingly complex financial world.

Investment Strategy & Planning

Gain access to **professionally managed and personally tailored investment strategies** to help achieve the returns necessary to support your financial planning goals. We focus on three key areas – **asset allocation, asset location, and asset selection** – and provide customized portfolios to fit your needs.

Good financial advice from the right advisory firm can help you develop the perspective and discipline to stay the course.

Vanguard Study

Estate & Legacy Planning

Coordinating with expert professional resources to **protect and transfer your assets to heirs** in a tax efficient and private manner. We help with estate plan reviews and modeling, family and charitable giving strategies, and engaging and educating the next generation to ensure a lasting impact on your family and community.

Tax Planning

Focus on **keeping more of what you earn** and lowering your lifetime tax bill with smart and efficient tax-planning, including reviews of tax returns, tax projections, executive compensation reviews, and pre-tax vs. post-tax savings analyses.

We build more than just financial plans. We build life plans.

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Risk Management

Protecting your family and your wealth. We assist you in achieving peace of mind with an ongoing focus on risk management and coordination of resources. We help mitigate risks by assessing your insurance needs to ensure appropriate life, health, long-term care, disability, and property and casualty and, umbrella coverage.

College Planning

Determine what college tuition will be and decide on the **most effective way of saving for this goal**, including a review of tax-savings opportunities and investment strategies.

Specialized Planning

Providing access to **subject matter experts** in a host of areas, including: executive compensation, stock options, real estate, business sale and valuation, and more.

Plan the Life of Your Dreams. Then Live It.
Ask About a **Life Plan.**

Sophisticated Investment Strategies + Prudent Planning = **Financial Peace of Mind**
To schedule a free consultation, visit **hoylecohen.com**

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Where Wealth Meets Experience

- **1700+ households** served
- **$3+ billion AUM**
- Specialized **planning** and investment **strategies**
- Tailored **programs** for families, women, executives, and business owners