

Women & Wealth Practice

A Division of HoyleCohen

Searching for a different kind of wealth management partner? One who listens and offers **personalized options, transparency, and engagement as a collaborative partner**? Welcome to Women & Wealth, a dedicated HoyleCohen practice led by experienced professional women with the expertise to help grow and protect your wealth through life's many chapters.

Our Practice

How can we help you reach your financial goals? Do you feel like you are getting the most out of your investment portfolio? Are you facing a difficult or unexpected life transition such as divorce or widowhood? Are you balancing a demanding professional and personal life? Could you use some guidance integrating healthcare and other costs into your retirement plan?

Since 2011 we have helped hundreds of women with over \$1 Billion in combined assets become more confident, educated, stewards, of their money. **Our advisory teams are passionate about partnering with women on their wealth journey.** We offer guidance on investing for wealth, financial and legacy planning, tax planning, college planning, executive compensation planning, business ownership exit planning, and a myriad of other services.

Education. Advocacy. Expert Advice.

Helping women
become more
confident, educated,
stewards of their
financial lives.

Our team of professional advisors take time to listen and understand both your financial and life goals. Then we provide the guidance necessary to help you make thoughtful financial decisions by considering all the pieces that can help you achieve them.

Why Women & Wealth?

Holistic Financial Planning

We address your total wealth – from taxes and investments to insurance, estate planning and philanthropy – so it can grow and flourish into the next generation and beyond.

Plan well. Live Fully.

858.576.7300 | info@hoylecohen.com | hoylecohen.com

Enduring Relationships

Through all the changes life throws at you, we hope to be your **lifelong wealth management advocate**, getting you on a sustainable, self-sufficient track to live the life you want today and tomorrow.

Forward-looking Investment Strategies

We combine **proven strategies** and can offer a broad range of **alternative investment options**, to create customized investment plans for achieving financial independence for you and your generations to come.

Transition Advisory Services

Life transitions often bring financial and emotional challenges that require empathy, understanding and financial expertise. Through Women & Wealth, you will have **access to timely advice as well as someone you can rely on when you need it most**.

Education, Advocacy, Expert Advice

You can rely on our dedicated team of **25+ professionals with more than 250 years of cumulative industry experience** who are passionate about helping women navigate their wealth journey. We are always only a phone call or email away.

Plan the life of your dreams. Then live it. **Let's chat.**

Sophisticated Investment Strategies + Prudent Planning = **Financial Peace of Mind**

To schedule a free consultation, visit hoylecohen.com/how-we-help/women-wealth

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