Advisory Services

Clarity in Complexity

Looking to cut through the complexity to find a comprehensive path 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. That's why we've spent 20+ years building a practice of experts to help our clients find and navigate their path. Our teams specialize in a myriad of wealth management services including but not limited to:

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

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, save for college, plan for retirement, or strategize around other major life events.

Investment Strategy & Planning

Delivering 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.

Estate & Legacy Planning

Coordinating with 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

Helping you to **keep more of what you earn** and lower your lifetime tax bill with smart and efficient tax-planning, including tax return reviews, 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 and planning for appropriate life, health, long-term care, disability, and property & casualty coverage.

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

College Planning

Projecting future college tuition costs and determining the **most effective way to save for it**, 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 transitions and valuation, and more.

Plan the life of your dreams. Then live it.
Ask about a **life plan**.

To schedule a free consultation, visit **hoylecohen.com**.

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Where Wealth Meets Experience

As of 3/31/24

- **1700+ households** served
- **$3.4+ billion AUM**
- Specialized **planning** and investment **strategies**
- Tailored **programs** for families, women, executives, and business owners