

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? Look no further than HoyleCohen's Women & Wealth division, a dedicated practice led by women, for women.

Our Practice

The founders of HoyleCohen Women & Wealth created this practice to address the specific and special needs of women who for many generations have been left out of the financial conversation. Our teams have serviced hundreds of women through divorce, widowhood, raising families, entrepreneurship, and a whole host of other life stages. We understand that while women have common needs, each one is unique, and a one-size-fits-all approach does not generally work.

How can we help you reach your financial goals? Do you need assistance managing your investments? Are you facing a difficult or unexpected life transition such as divorce or widowhood? Are you having difficulty balancing a demanding professional and personal life? Do you feel like you are making the soundest financial decisions possible?

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.

Education. Advocacy.
Expert Advice. Helping
people in transition feel
empowered to embrace
financial independence
today & beyond.

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.

Thoughtful Decisions. Greater Possibilities.

858.576.7300 | info@hoylecohen.com | hoylecohen.com

Enduring Relationships

As your lifelong wealth management advocate, we help put you on a sustainable, self-sufficient track to live the life you want today and tomorrow. It is our pleasure and passion to help you become a confident, educated, steward of your financial life.

Forward-looking Investment Strategies

Combining proven strategies with a broad range of alternative investment options, we create a customized investment plan for achieving financial independence for you and your future generations.

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

Our Women & Wealth specialists use our proprietary **Wealth by Design process** to help you **manage your wealth** with confidence and control.

Everyone talks about trust, we prefer to listen.
Let's chat.

Explore your options, visit hoylecohen.com/how-we-help/women-wealth
p: 858.576.7300 e: info@hoylecohen.com

Disclosures: On 09/01/24, HoyleCohen, LLC ("HoyleCohen") merged with and into The Colony Group ("Colony"). Clients of HoyleCohen assigned their advisory agreements to Colony.

The information in this report is educational and general in nature and is not intended to be, nor should it be construed as, specific investment, tax, or legal advice. Individuals should seek advice from their wealth advisor or other tax advisors before undertaking actions in response to the matters discussed.



Thoughtful Decisions. Greater Possibilities.

858.576.7300 | info@hoylecohen.com | hoylecohen.com