

Retirement savings
made easy.



Wealth Management

h&hSM
hooker & holcombe



Keeping your retirement on track.

We all want a comfortable retirement, and saving for your retirement might be the most important thing you do with your money. The earlier you begin, the better off you will be when the time is right for you to retire.

Starting to save for your future is important. We'll show you the way.

You probably have a lot of questions about saving for your retirement, or other important milestones such as your first home or college expenses. We will work with you to identify opportunities, achieve your goals and exceed your expectations.

We start by reviewing your current situation using a proven risk tolerance method. Then, we will work together to help you make wise decisions to move you forward . . . and keep you moving in the right direction.

The difference between an investment and an account.

Once we identify your risk tolerance and financial goals, we need to choose the right type of investment. When you choose an account, you're deciding how you want the money in your account to be treated. For example, an IRA has certain rules about how much money you can add to it annually and may offer tax breaks as well.

But this process is not just about creating an account. Our team of knowledgeable professionals have the expertise to guide you through the decision-making process and identify the asset mix that works best for you based on your goals, risk tolerance and time horizon. Ongoing oversight by our team can help keep your strategy on track.

Let us help you decide what works best for you.

You may be an experienced investor who wants to be fully involved, someone who knows a bit about the markets but needs a little guidance, or you just want someone else to manage the ongoing decisions. No matter what your level of investing experience, we have a service level that fits your needs.

	Portfolio Analysis	Retirement and Financial Planning	Full-Service Financial Management
Customized investment analysis	●	●	●
Discussion of goals and risk tolerance	●	●	●
Buy and sell recommendations	●	●	●
Implementation guidelines	●	●	●
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Net worth assessment		●	●
Current cash flow analysis		●	●
Retirement income projection		●	●
Insurance review/risk analysis		●	●
Income tax, retirement, education and estate planning*		●	●
Executive benefits analysis including a restricted stock and stock options analysis		●	●
Hypothetical “what if” planning scenarios		●	●
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Customized portfolio management			●
Ongoing portfolio monitoring			●
Quarterly portfolio reports			●
Quarterly meeting with your financial advisor			●
Annual portfolio review and financial planning			●

Ready to move forward?

Contact us. With our experts by your side, you’ll receive sound advice about your investments and how to manage them, now and into retirement.

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* The information in this brochure is not intended as tax or legal advice, and it may not be relied on for the purpose of avoiding any tax penalties. You are encouraged to seek tax or legal advice from an independent professional advisor. The content is derived from sources believed to be accurate. Neither the information presented nor any opinion expressed constitutes a solicitation for the purchase or sale of any security.

About Hooker & Holcombe

Hooker & Holcombe opened its doors in 1956 as a full-service pension and actuarial consulting firm. Over the years, the firm has expanded its services to include comprehensive, integrated consulting and investment advisory services for all types of employer-sponsored retirement plans. In addition, wealth management services are available to individuals seeking customized financial planning services. Hooker & Holcombe's reputation for integrity, combined with its ability to deliver outstanding professional services, has made it one of the premier actuarial, retirement services and investment advisory firms in the Northeast. For more, visit hhconsultants.com.



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