

Putting Your Savings to Work



Wealth Management



h&hTM

hooker & holcombe

As you move forward in life, we can help you move more wisely.

We all dream about a worry-free retirement. How can you be assured that you will have enough saved to do the things you want to do when you're ready?



With Hooker & Holcombe Wealth Management by your side, you'll have the expertise needed to help you determine your risk appetite, set attainable goals and develop a strategic plan designed to help get you there.



Whether you're an experienced investor who wants to be involved, someone who knows a bit about the markets but needs a little guidance or you just want someone else to handle

the ongoing decisions, we have a program that fits your needs.

Turn to us. Together, we'll make wise decisions to move you forward — today and tomorrow.

Ready to move forward?

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Portfolio Analysis

Designed for the engaged investor, and includes:



- Customized investment analysis
- Discussion of goals
- Retirement plan analysis
- Buy and sell recommendations
- Implementation guidelines

Retirement and Financial Planning

Includes all of the features of the Portfolio Analysis, plus:



- 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
- “What If” planning scenarios

Full-Service Financial Management

Includes all of the features of the Portfolio Analysis and Retirement and Financial Planning models, plus:

- Customized portfolio management
- Ongoing portfolio monitoring
- Quarterly portfolio reports
- Quarterly meeting with your financial advisor
- Annual portfolio review and financial planning



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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Investment advice is offered through Hooker & Holcombe Investment Advisors, Inc. ("HHIA"), an SEC Registered Investment Adviser.

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