Investment Strategy for Your Future

Wm

Wealth Management

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Investment strategies can differ widely from a rapid growth strategy where an investor focuses on capital appreciation to a safety strategy where the focus is on wealth protection. The most important part of any investment strategy is to ensure that it aligns with your goals and is closely followed by your wealth advisor.

We start and end with your goals in mind.

Before we begin, it's important that we fully understand your goals, wants and needs. Are you a savvy investor but don't have the time to devote to monitoring the markets? Or, does the thought of making investment mistakes send a chill down your spine?

Are you at the mid-career stage, possibly with a family and college on the horizon? A younger investor who is just starting out? Or, are you nearing retirement and seeking advice on how to "catch-up" so you're prepared when the time is right for you?

No matter what your situation, our professional advisors will work with you to align your portfolio with your goals. Our oversight includes monitoring your investment strategy on an ongoing basis, ensuring that your investments remain on track to help you achieve your goals.

Earning your trust.

As fiduciaries, we understand responsibility and stewardship. Our primary focus is on you and doing what is in your best interest:

- We are not a bank, commercial lender or insurance company;
- We do not receive incentives or commission on any investment products in our portfolios

What's different? We operate under one comprehensive, transparent fee that covers all of our services. No surprises and no double-talk. Period.

Let our experts guide you.

Our goal is to help you achieve yours. That's why our investment team is comprised of seasoned professionals with the experience and insight needed to guide you through the investment maze. Our team meets weekly to discuss ongoing market and investment themes, and quarterly to review and update our strategic asset allocation strategies.

We don't jump from one trade to another, putting little effort into creating and measuring overall strategies. We use the knowledge gained through collaboration among our team to identify investment opportunities while building our portfolios. In assessing your individual risk tolerance and goals, we identify the portfolio that is most likely to get you where you want to go.

Ready to get started?

Getting your retirement plan on the right track is easy with Hooker & Holcombe by your side. First, we will set up an account through a limited power of attorney arrangement. Then, we will coordinate on your behalf with Charles Schwab & Co., Inc. (Schwab) to be the custodian of your account. Schwab has a long history of servicing clients and has earned a reputation of being one of the largest financially-stable custodial service providers in the industry.

Contact us. Together, we will build a retirement strategy that works for you now and into the future.

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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.