Friends & Family First

SECOND OPINION SERVICE

As a valued client of Hobart Wealth, you know that we specialize in personalized financial guidance. Now we're pleased to offer our expertise to our clients' friends, family and colleagues with our Second Opinion Service through our Hobart Friends & Family First Program.

The Power of a Second Opinion
You may know someone who is in a complex financial situation or unhappy with the advice or service they've received from their current advisor. Or they may be looking for validation that their financial plan is solid. Whatever the reason, if you know someone who could benefit from what we do, we'd love to offer them a Second Opinion consultation, free of charge.

> **What They'll Get**
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> When you send someone our way, the first step is to schedule a Discovery Meeting with them. During this meeting, we'll learn more about how we can help and find out if we're a fit to work together.
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> Once we've established a working relationship, we'll have them return for their Investment Plan Meeting, where we'll review their current financial plan. Hopefully, we'll confirm they're on track to fulfill their goals with their current financial provider. We might also suggest ways in which we can help, including recommending another licensed professional if needed.
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> Everyone who holds an Investment Plan Meeting will receive a HW Blueprint Review and a personalized analysis of their current situation.

Let Us Help Those You Care About
If you know someone interested in working with us, we'll set an appointment for a review of their current situation, financial plan and goals. If we discover they're on track and getting the right advice – great! We'll send them on their way with peace of mind. But if we see steps they can take to strengthen their financial future, we'll lay out a plan for them to consider so that they can enjoy the comfort of knowing they're on track to reach their goals.

HW HOBART WEALTH