HW

TEAM APPROACH

When you work with us, you get an entire team of professionals ready to serve you. Each team member is a specialist at what they do, no matter what role they fill. From investment advice and financial planning to general support, we have the right people in place to serve you efficiently and effectively, every time you contact our office.

Your financial team will include several key people within our firm, each of whom fills a specific role:

Senior Wealth Advisor/Wealth Advisor – You will build a one-on-one relationship with a Senior Wealth Advisor/Wealth Advisor, who will spend time meeting with and getting to know you. They'll serve as the point person, identifying the right financial strategies for your situation. All of our Senior Wealth Advisors/Wealth Advisors have earned a CERTIFIED FINANCIAL PLANNER™ (CFP®) designation.

Investment Strategist – The investment strategist takes a deep dive into your portfolio, making sure you are always allocated strategically to maximize growth and address potential risk.

Service Advisor – This advisor works in tandem with the Senior Wealth Advisor/Wealth Advisor and Investment Strategist to ensure your strategies are implemented correctly. They also keep a close eye on your accounts, recommending changes to your investments when necessary.

Client Services Specialists – Our client services team handles most of the day-to-day tasks related to managing your account. You'll talk to one of our client services associates when you need to update your address, schedule an appointment, change a beneficiary, request a distribution or any other question about your account.

Insurance Strategist – You will work with the insurance strategist to review your insurance needs and find the right strategies to address your family's current and future insurance needs.

With our team approach, you get:

Access to our collective range of expertise, experience and specialized knowledge

Expert advice in the areas of financial planning, investment management, tax, insurance and estate planning

Knowledgeable technology support for your online accounts

Fast, accurate answers to your questions – even when your Senior Wealth advisor is unavailable

Account updates that are completed efficiently each and every time

When you have questions, you can directly contact an individual team member. Not sure who to contact?
Call **888.553.0122** or email **care@hobartwealth.com** and we'll connect you with the right person.

HW HOBART WEALTH