



Helping Deliver a Customized Client Experience!

Collaboration



Partnering together to jointly create a better client outcome.

Coordination



Together, we provide all the elements that ensure efficiency and harmony.

Scalability



Utilize our expertise to make better use of your time for clients and prospects.

Flexibility



The ability to adapt, understand, and provide clarity.

Case Design Prep Desk Components

► Voyage Income

Answering clients' most important and relevant questions by using our income centric Voyage Income Program. Unique in that it is not a risk-based solution, but rather an income based one driven by each clients' unique situation, needs and dreams. We review income streams, current investments, distribution needs and provide a written personalized client presentation. Then, we help you develop the implementation plan and the conversation around both.

When can they successfully retire? Is there a risk of running out of income? What does their future legacy look like and how to best handle?

Together, we can help solve for your clients' long term end game – Retiring with Confidence.



Individual Investment Proposals for each Household Account

Building custom proposals for each account in the household as we target defined time segments for accumulation and distribution.

Reasons to focus on this individual account rather than just the household view?

Time Segmentation

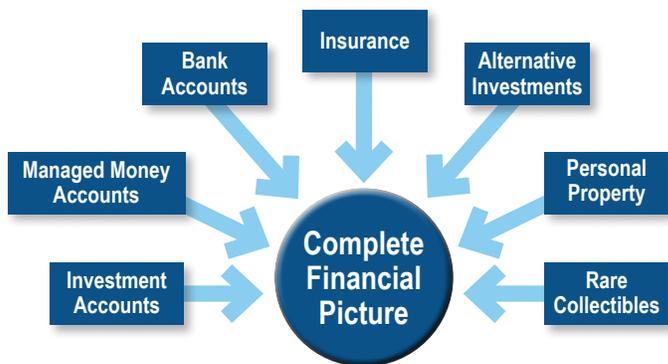
All too often, investors do not have an outline of how their wealth will be distributed in retirement and how that wealth should be positioned now and when that event occurs. Our individual approach provides clarity and defined execution of the clients' plan.

Tax Consequences

Lack of coordination can lead to increased tax burdens as your complete financial picture is unknown thus leading to investment inefficiencies.

Higher Fees

You are likely paying higher than necessary fees as there is no economies of scale and pricing thresholds aren't being met.



Account Aggregation

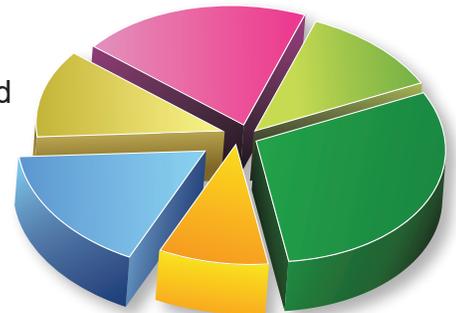
Acknowledging that most clients have multiple advisor relationships can help build trust with your client while allowing you to assume a Trusted Advisor leadership role. Encouraging clients to permit this level of visibility allows for greater trust and coordination thus assuring better, and more meaningful, outcomes. After all, it is difficult and sometimes impossible to solve a puzzle with only half the pieces.

Personal Client Portfolio Reviews

Are your clients truly diversified and have you personalized their household assets to assure the desired outcomes??

Use the Personal Client Portfolio Review to evaluate your client's overall asset allocation and sector weightings as well as uncover concentrated positions, view the stock holdings behind your mutual funds, measure performance against benchmarks and industry indexes.

You can demonstrate that spreading investments across multiple advisors and investments may not make them as truly diversified as they thought. Help them understand true investment diversification, while demonstrating additional value add.



Contact us at: Phone: 609-601-1200 | Email: Sales@Hanlon.com | Online: Hanlon.com

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3393 Bargaintown Road, Egg Harbor Township, NJ 08234 | Phone: (609) 601-1200 | Fax: (609) 601-7171 | www.Hanlon.com