HANLON
Investment Management

Leveraging a Boutique Asset Manager

Expanding Your Team

- Financial advisers focus on the holistic picture: cash flow, taxes, insurance and income needs.
- Full-service asset managers grow the team focused on helping you get to where you need to be.

Access

- We provide access to some of the largest asset managers in the world.
- Our job is to collaborate with your planner and build a custom investment portfolio for you.

Personal Income Planning Approach

- When you and your adviser have constructed a clear plan, our goal is to enhance that plan and bring it to life.
- We coordinate our portfolio construction with your goals and may construct an income plan for you as well.

Family Focus

- Households we work with are billed on cumulative assets, significantly reducing fees.
- Our multi-manager solutions are reviewed quarterly, so each time you are billed, you can be sure our team reviewed the underlying strategies and made any necessary changes.

Private Family Services - Private Banking

- Clients have access to Pershing's private-banking capabilities, to borrow against the value of their portfolio.

Legacy / Sentimental Assets

- Families often hold legacy assets of sentimental value (stocks / ETFs) in our portfolios.

Profit Harvesting

- Our team seeks to take advantage of outperformance and rebalance portfolios to reduce risk.

Technology

- Each of your household members have access to client portals for aggregation and performance.

Review

- We coordinate with your adviser frequently to review your plan and portfolios.

Achieving Your Goals

- Your goals drive us - we have been helping clients achieve their goals for over 20 years.
- Partnering with your adviser gives you a dedicated set of eyes on your portfolio and plan.

BlackRock | Dorsey Wright Nasdaq | Hanlon | Northern Trust Asset Management | Russell Investments | Wilshire

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