HANLON
INVESTMENT MANAGEMENT

Our Biggest Value-Adds

Who We Serve Best?

Clients working with us through our VIP program tend to have:

1. A financial strategy that's easy to understand and execute
2. Assets in excess of $500,000 (or on track to accumulate)

In coordination with the planning work, we provide:

1. Personal, written income plan to demonstrate when and where you'll draw income from in retirement
2. Customized investment solution of world-class managers, reviewed quarterly
3. Ongoing review and adaptations based on changing goals

How We Add Value

Clients in our VIP program receive the following:

- Expanded team to help you reach your goals
- Access to institutional solutions (typically only available to large, corporate investors)
- Ongoing collaboration with the team planner regarding your portfolio, the markets and strategies through regularly scheduled calls

Additional services include:

- Profit-harvesting opportunities to take advantage of excess growth
- Annual income plan reviews
- Automated additions to, and distributions from, your accounts
- Access to private banking solutions through Pershing

Our Full Suite of Services

Our VIP program is an exclusive, holistic approach to your entire financial picture, including a personal, written income plan with a custom investment solution, unique to you.

Let our Team help you with these big decisions.

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

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