A Plan For Every Stage In Life

Sustaining Your Family, Reaching Your Dreams

At the core of your relationship with Hallett Advisors is a coordinated approach to managing your wealth, providing you and your family the security that comes with knowing you have planned financially for every stage of your life. We can help you:

Accumulate: Achieving your dreams starts with articulating and quantifying them.

Manage: We work with you to design an investment strategy tailored to meet your specific financial goals based on your individual risk tolerance.

Protect: Your investment portfolio is only half of the equation. You also need ideas to minimize your tax liabilities and guard your family's financial future from unforeseen events.

Enjoy: They say life is what happens to you while you're making other plans. We'll help you balance your current income and liquidity needs with your long-term goals.

Distribute: The right planning can help ensure that what you have built will eventually benefit the people and organizations that mean the most to you.

Hallett Advisors
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Planning For The Best Years Of Your Life

Hallett Advisors

Plan Well • Live Well

Face The Future With Confidence

A Financial Services Boutique

At Hallett Advisors, It's All About You

As a boutique advisory firm, we offer you service that is personal, private, and exclusive. We aspire to have only a limited number of clients but to provide personal service to every one of them. We honor our relationship with you by providing customer service and attention you will not find elsewhere.

- We take the time to understand your goals in life and how you feel about your money.
- We can advise you on all your financial affairs—investing, retirement, estate planning, insurance, and other issues—or design a plan to address a single aspect of your finances.
- Your financial plan shows you what you need to do to fund your goals in life.
- Your portfolio is tailored to your goals and your ability to withstand market losses.
- Investments are monitored and you receive reports quarterly about performance.
- You will understand everything we do for you—your investments, fees, and financial plans.
- As a privately held independent advisory firm, our advice is not influenced by a corporate parent and we are free to choose the right solutions for you.

Realistic Plans For A Fulfilling Retirement

Seeing The Whole Picture, Taking The Right Steps

Financial planning is not an event; it is a process. Our principals are financial planning specialists who will work with you one-on-one, developing a deep understanding of your financial objectives, personal preferences, family situation, and risk tolerances and then designing a life plan around you. Working as your personal CFO, we will meet with you regularly to:

- Get to know you and your family and what's important to you
- Help you identify and prioritize your long-term goals, focusing on retirement
- Create a vision of your future—your lifestyle, where you'll live, and how much it will cost
- Forecast the growth of your portfolio, making realistic assumptions that you agree with about the risk you are willing to accept and the investment returns you should realistically expect
- Model different scenarios for achieving your goals, showing you how different decisions—such as retiring a couple of years later or working part-time—can impact your nest egg
- Help you make the best decisions that fit your current situation and long-term expectations

Wealth Management Based On Trust

As A Fiduciary, We Are Different From Other Advisors

As a registered investment advisor regulated by the U.S. Securities and Exchange Commission, Hallett Advisors works exclusively for you, putting your interests first in all we do. Working as your advisor, we are a fiduciary and must always protect your best interests and disclose to you any conflicts that could prevent us from serving you. This makes our role very different from the traditional financial advisor to individual investors—a stockbroker—and we take seriously our responsibility to act as your fiduciary. Our commitment to serve as a fiduciary forms the foundation required in a trusting advisory relationship.

Empowering You To Take Control

Education Is Your Key To Success

Hallett Advisors' education-oriented process empowers you to achieve long-term financial security. You get peace of mind from understanding the financial planning process, and then we guide you on the best ways to get from where you are today to where you want to go, while avoiding potential distractions along the way. Our approach is designed to simplify your life by reducing your anxiety about finances. The result is a happier, healthier lifestyle that gives you the freedom to live your life based on what you want to do, not just what you have to do.

Estate And Trust Solutions

Protecting Your Legacy

It is never too soon to begin planning for the efficient transfer and distribution of your assets. Estate tax laws are complex, and how you manage your assets today will have a direct impact on your heirs. We can:

- Design trust strategies to protect your estate from unnecessary fees and taxes
- Provide ongoing care for elderly parents or special-needs children
- Develop a strategy for charitable giving that reflects your values and makes a meaningful difference