

TSA Portfolio Management, Inc.
HRC Investment Services, Inc.
Halliday Life & Health, Inc.



Halliday Financial Group

Follow Us Forward

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HRC Investment Services, Inc.

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The Oak Tree

“The oak tree, as our corporate symbol, is an important manifestation of our mission on behalf of our clients, because investing is much like planting an acorn and nurturing its growth.

You begin by creating an environment that provides the greatest opportunity for steady development. Attention is on a long-term commitment that will eventually produce optimum results.

As time passes, from a tiny acorn the sapling begins to flourish. There is no radical change in its care ... you do not uproot the tree to protect it ...

The reward comes when you can enjoy the shade of a strong oak and feel safe under its branches.

At Halliday Financial Group, we take pride in fostering your financial safety. We assist our clients in all aspects of financial planning, providing our expertise and consultation when it is appropriate to make adjustments. We take satisfaction in seeing clients realize their dreams.”

– Dr. Robert W. Halliday, founder

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Who We Are

Halliday Financial Group was established in 1982. Our original mission was retirement planning for educators. Today we are the statewide leader in servicing the financial needs of the higher education community. We have expanded into financial management for a variety of clientele; from individual investors and small business owners to large for-profit and not-for-profit organizations.

Halliday Financial Group consists of three specialized entities: HRC Investment Services, Inc., TSA Portfolio Management, Inc., and Halliday Life and Health. By maintaining these separate divisions we are able to offer our clients the variety of financial services they need.

HRC Investment Services, Inc.* offers flexible investment-portfolio development by providing access to a wide variety of mutual funds and variable annuities.

TSA Portfolio Management, Inc. is a full-spectrum investment-advisory firm focused on personalized mutual-fund portfolios.

Halliday Life and Health will cover all of your insurance needs; we will help you protect your assets and provide security for your future and the future of your loved ones.


The future of your financial security is only as secure as your financial planning.

Follow us forward.

At Halliday Financial Group we have a plan. Every plan worth following is manifold; in the financial realm, that means assessing not only your financial growth potential, but also your financial risks. At Halliday Financial Group we look at the areas of retirement savings; loss of family wages and potential long-term healthcare costs; future expenses (such as college education costs); and estate taxes, and the issues of tax efficiency in nonretirement portfolios. Our goal is to address these issues and find the solutions most suitable to you and/or your company's circumstances.

Remove the guesswork from your financial decisions. **Follow us forward.**

*Member NASD.



***“You do not
uproot the tree
to protect it.”***

Focus on the Long Term

Using thorough fact-finding interviews we come to understand the goals of our clients. Once those are well defined we can construct a long-term plan aimed at achieving your goals and meeting your objectives.

By focusing on the long term, we avoid the hazards of seeking to successfully time investments.

Any solid financial plan also seeks to avoid these major impediments to your financial success:

Healthcare Risk: The financial liability of a change in the health of an individual or family members

Inflationary Risk: The possibility that eroding purchasing power will negatively impact one's financial security

Investor Behavior Risk: Random investment decisions based on conflicting emotions due in part to poor financial planning

Loss of Family Wage Risk: The chance that a family wage-earner could become injured or die, thereby dramatically affecting the household's financial status

Tax Risk: Unless managed properly to maintain desired returns in the face of taxation, taxes will negatively affect nonretirement portfolios

Every successful plan begins here. Once your risks have been assessed, we can help you plan for the future you want.

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Investing in the Future

For over 25 years Halliday Financial Group has been an expert resource for its clients' financial needs, utilizing a full spectrum of financial options to position its clients for success.

We have the answers to all your financial questions, just ask us. Once we've determined your financial risks we can help you with our:

Full-service independent investments

Retirement Planning

Fee-based portfolio management

Cutting-edge fee-for-service financial planning

College-cost planning

Estate planning

Long-term healthcare planning

Business succession planning

Mortgage brokerage

Your financial future begins here. Your financial future begins now.

Follow us forward.

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It's About You

Halliday Financial Group's advisors will take the time to know you and your financial needs in order to provide you the most appropriate strategies. We're here to help you realize your vision of the future.

What is your role?

- Make an appointment with a Halliday Financial Group advisor
- Begin to define your goals
- Be involved
- Be open to new ideas but ask questions about your choices
- Review your overall financial and investment plan with your advisors at least once a year

If you are seeking a dedicated partner and superior services, contact:

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