



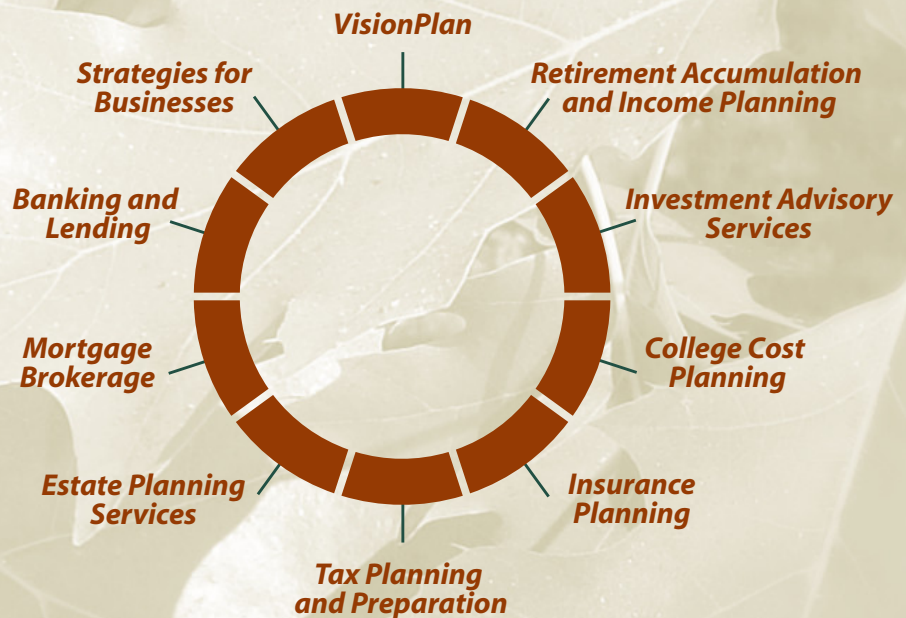
Halliday Financial Group

Complete

One Firm. One Advisor.
One Complete Solution.

At the Halliday Financial Group, we believe that life should be lived completely.

That's why we offer a complete financial solution: Halliday **Complete**.



From personalized investment strategies and insurance planning, to college and retirement, Halliday **Complete** fits the pieces together.

We offer comprehensive guidance and access to a range of solutions designed to simplify your life and get you where you want to go.

Follow Us Forward



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VisionPlan You have your own vision of financial success. It is our job to understand that vision, and to suggest effective ways to achieve it. Our VisionPlan approach to financial planning stands out in the industry because of its comprehensive, 360-degree look at your life.



Retirement Accumulation and Income Planning Retirement is a process rather than a one-time event. It takes years of planning and saving to ensure you have enough to enjoy this exciting stage of life. We offer effective strategies for creating a nest egg that will let you draw the income you need for many years.



Investment Advisory Services Personalized guidance is the cornerstone of your relationship with Halliday Financial Group. We provide you with custom-tailored investment strategies. Our institutional-quality asset allocation encompasses a range of traditional and alternative assets to meet your short- and long-term goals.



College Cost Planning You want to educate your children, and maybe even your grandchildren. These days, that usually means graduate school in addition to college. We can help you prepare for those expenses by projecting realistic values for tuition and related education expenses. And we can devise investment strategies to cover those costs.



Insurance Planning You've worked hard to accumulate your assets. We know how important it is that those assets be protected. Halliday Financial Group provides life, long-term care and disability insurance solutions. Our goal is the same as yours: to ensure your assets are used as you intended.



Tax Planning and Preparation We believe that, lacking proper tax planning and income tax preparation, unnecessary taxation will have a negative impact on your financial success. That is why Halliday Financial Group has a staff of CPAs to ensure that your tax preparation dovetails with the rest of your financial situation.



Estate Planning Services Our attorney network consists of experts using the most up-to-date strategies for passing your assets the way you want and minimizing estate taxes. Through our network, we provide you the legal services to create a plan that will preserve the value of your estate and protect your family.



Mortgage Brokerage At Halliday Financial Group, we know that your investment portfolio includes more than just stocks and bonds. Your home – or homes – represents a major investment. We offer mortgage brokerage services to our clients to help them take the guesswork out of real estate financing.



Banking and Lending Halliday Financial Group offers you access to a wide range of banking services including cash management, credit and debit card services, online bill payment services, non-purpose lines of credit and other borrowing facilities – all integrated with your overall financial landscape.



Strategies for Businesses When you own a business, you may need more than personal financial planning. That's why Halliday Financial Group is equipped to help serve your business as well. We offer retirement plans such as 401(k)s, SEP IRAs and SIMPLE plans. We can coordinate your company's group health benefits. And we can devise a plan for the succession or sale of your business, so that its future is secure.

We solve problems

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

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