Educational Seminar Series

Started in 1982 by a college chemistry professor, Halliday Financial was created to address the financial future of the higher education community. Since then, Halliday has been successful at enriching the financial lives of our college and university educators. That is why for over 30 years Halliday Financial has emphasized its commitment to education through its popular and informative Seminar Series. We believe that knowledge is an important step to reaching your financial goals and objectives. Whether customized for specific audiences or offered to the general public through local colleges, our seminars provide an educational service to our community empowering attendees with the knowledge necessary to take charge of their financial future.

With three offices in key locations, Halliday Financial is dedicated to applying creative strategies to the diverse financial objectives of our clients. Halliday Financial provides important services such as retirement planning, college fund planning, life and health insurance and saving arrangements to accomplish major goals. Through a customized, long-term plan and a broad universe of financial products at its disposal, our clients benefit from the knowledge that we understand where they want to go and have what it takes to get them there.

Albany  14 Corporate Woods Blvd • Albany NY 12211 • 518.463.2200
Cooperstown  211 Main St • Cooperstown NY 13326 • 607.547.5816
Long Island  725 Glen Cove Ave • Glen Head NY 11545 • 516.671.1099
Popular Seminar Topics

These courses are strictly educational and there will be no solicitation on any specific investments. All instructors are Licensed Financial Advisors with Halliday Financial in Albany, NY. To learn more about course topics, please feel free to call us at 518-463-2200 or contact us on our website at www.HallidayFinancial.com.

Pre-Retirement Planning for the Baby-Boomers

This educational seminar is geared to answering important pre-retirement questions for the baby-boomer generation and also to making sure they are asking the right questions. This course will discuss the primary shift in investment strategy from accumulation to preservation and distribution. Additional topics include asset protection and control, required minimum distributions (RMDs), health care, and tax management of distributions and estate. Most are mentally prepared for retirement but are you financially ready as well?

Understanding Stocks, Bonds, & Mutual Funds

Halliday’s flagship course has been heard by THOUSANDS of people since its launch in 2003. Learn the basics from our investment professionals of stocks, bonds, and mutual funds, the staples of the modern portfolio. This course will help you understand the differences between various types of investments in order to help choose which are right for you. Learn how proper asset allocation can lower your overall risk and increase your return. Track and monitor your investments with confidence as you plan your financial future.

Maximize Your Social Security Benefits

Make sure you are aware of the few key decisions that can make a big difference in the amount of your Social Security benefit. Attend our workshop and learn strategies for maximizing your benefit, tax planning and supplementing your retirement income. The session will cover key Social Security benefit decisions and simple steps that can help maximize your benefit. Join us before you make landmark decisions that are unable to be reversed.

Important FAQ’s of Long-Term Care Insurance

Long-Term Care is one of the hottest topics in the insurance and estate planning industries today. Join us to find out the “must-knows” of Long-Term Care Insurance and if it is right for you. When should you purchase it? What does it cover? More importantly, what isn’t covered? We share these answers and more with you as you develop a plan for your health care in retirement.

Paying for College Without Going Broke

Learn the strategies necessary to save for the fastest inflating cost your family will see in their lifetimes. These include concepts like the tax and gifting benefits of 529 plans and the flexibility and control features they offer, as well as savings plans that will not hurt your financial aid calculation or increase your expected family contribution but will help to offset tuition cost. This educational seminar is great for parents and grandparents alike.

Additional Halliday Seminar Topics*

- Building Inevitable Wealth
- Creating a Personal Pension Plan
- The Impact of the Affordable Care Act
- Multigenerational Financial Planning
- Alternative Investing Techniques
- Tax Efficient Planning Procedures

*Additional topics to be available as Halliday continues to expand its educational model.

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