Halliday Complete

A full spectrum of financial services for supporting financial success

Halliday Financial

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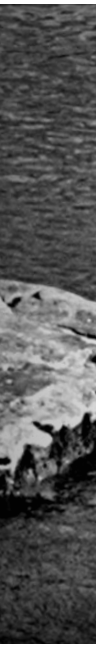
Who We Are

Since 1982, Halliday Financial has dedicated itself to energetically applying creative strategies to the diverse financial objectives of our clients. We are an independent financial services firm with access to every capital market and investment type without the trappings and restraints of a massive bank, insurance company or wire house.

Each of the financial advisors located in our regional offices is proud to serve the group of clients most in need of his or her assistance. From college educators, to institutional accounts; from business owners to wealthy families; from retirement plans to retirees; Halliday Financial brings solutions to financial problems and thoughtful strategies to financial opportunities.



At Halliday Financial, it is our mission to assist our clients in the process of solving problems, specifically a range of financial problems. We utilize a full spectrum of financial services to help our clients navigate every major obstacle in their financial lives. We believe that managing risk is an essential part of a complete financial picture.

Our role is to help clients make smart decisions about their money. We understand that each client has unique needs and therefore provide personalized solutions based on their goals, objectives and concerns.

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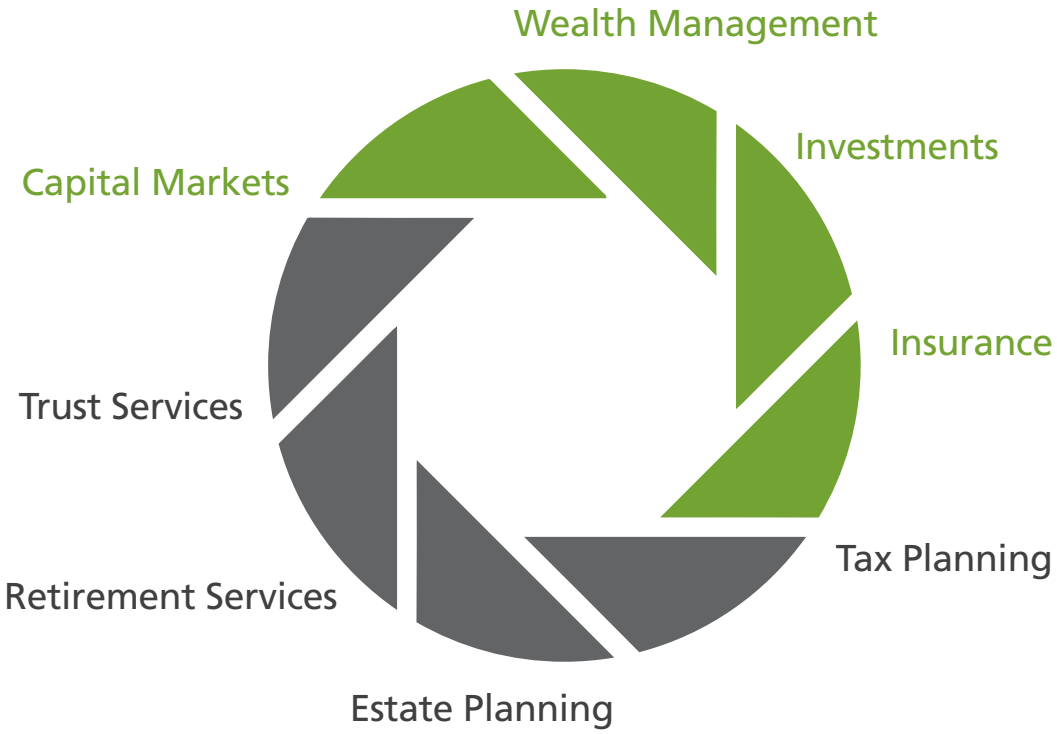

At Halliday Financial, we believe that life should be lived completely. That's why we offer a complete financial solution. From personalized investment strategies and insurance planning, to college and retirement, Halliday Complete fits the pieces together. We offer comprehensive guidance and access to a range of solutions designed to simplify your life and get you where you want to go.

Wealth Management

We are dedicated to serving our clients through a relationship based on mutual trust, integrity and intimacy. Those clients that come to Halliday Financial Wealth Management engage with us in a discovery process. The process is driven by an intensive dialogue to identify those factors that impact the client's wealth and the preservation of that wealth. As the dialogue proceeds, we uncover short and long-term goals and concerns, the structure of the client's financial assets, the client's exposure to and tolerance for risk, and opportunities for multigenerational planning. Once your wealth management plan is implemented, we continue to monitor not only the investments you own and your other assets but the changes in your personal circumstances.

Insurance

If we could predict exactly what would happen in our lives, there would be no need for insurance. Life insurance can be the anchor of your family's financial security and can help you leave that security to the next generation. Because your financial situation is unique, your life insurance needs are different from anyone else's. Halliday Financial offers a broad range of life insurance products to help provide financial protection for you and your family.

Capital Markets

Halliday Financial Capital Markets works closely with our clients to ensure that we meet their needs. Our clients look to us for the expertise to navigate a complex array of services and offerings in an ever-changing landscape.

Investments

Independence is the hallmark of our investment approach. Free to bring a virtually unlimited list of financial instruments to bear on our clients' need to invest for the future, Halliday Financial provides access to every major investment category necessary for the achievement of our clients' goals. Depending on our clients' strategic investment needs, Halliday Financial provides our clients access to a wide array of investment products. For some investors, mutual funds and fixed and variable annuities meet their needs. For others, cash management, managed fixed income and managed equities portfolios, brokerage accounts, equities, ETF and bond portfolios are needed.

Estate Planning

Only a third of all Americans have a last will and testament, and many of them would be surprised to find that their will is designed to do something very different than they thought. Some people are not sure what their beneficiary designations say and, most of the time, the results that would be achieved by current beneficiary designations are not consistent with their wishes. At Halliday Financial we use strategies, including specialized trust instruments, to create an estate plan designed for maximum tax relief, maximum flexibility and achievement of all of your goals.

Retirement Services

Many individuals are beginning to recognize that the traditional view of retirement is no longer accurate. Retirement is now often defined by such activities as travel, returning to school, volunteer work or the pursuit of favorite hobbies or sports. With this new view of a modern retirement and advances in healthcare the need for retirement planning has never been greater. Halliday Financial has been helping our clients build plans to achieve their financial goals for over three decades. Through corporate retirement plans or individual retirement plans, we can help build your solution.

Trust Services

Protection and provision for family members has always been near the top of practically every parent's priorities. For those wise enough to consider a long-term perspective, Halliday Private Trust can protect and help grow family wealth for multiple generations. Halliday Private Trust integrates seamlessly with your financial advisor to provide top trust technology and administrative support, with no need to change your investment philosophy, asset management style or portfolio holdings. Experience the comfort of a "true" fiduciary, with a common-sense and disciplined approach, combined with local personalized service and nationally recognized excellence.

Tax Planning

There's an old expression in financial services that states that it's what you keep that matters. At Halliday Financial, we believe that understanding the tax ramifications of financial decisions—ranging from selecting the right investments, to managing income taxation year to year, to estate planning for the most advantageous multigenerational tax impact—can be the difference between achieving financial goals and not achieving them. We give our clients the intelligent guidance through the tax landscape that is integral to their success.

It's About You

Halliday Financial's advisors will take the time to know you and your financial needs. Only then will the implementation of thoughtful financial strategies have the greatest impact.

What's Your Role?

- Make an appointment with a Halliday Financial 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 advisor at least once a year

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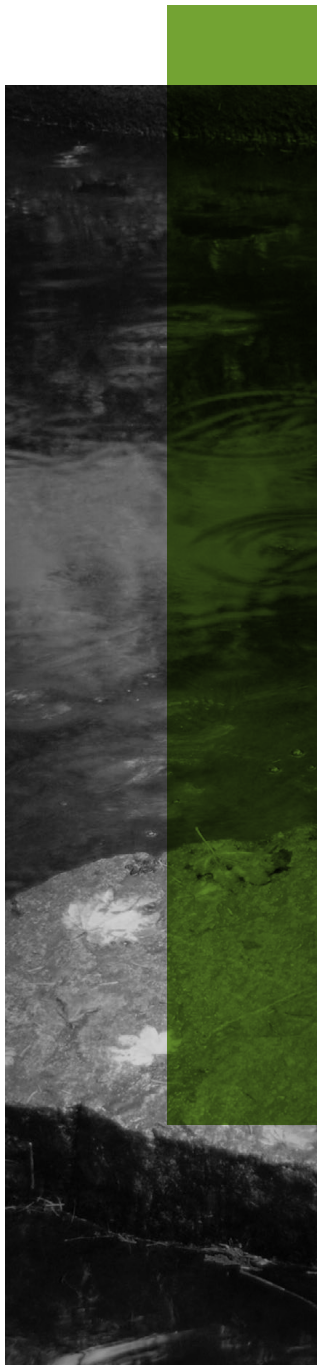

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