PAT HINCHEY, CFS, CFP®

My associates asked me to pen a few words to convey who we are and what we do. While I rarely write a "few" words, I think I can condense our firm's philosophy to a few thoughts.

I always tell clients that we are a conservative practice, meaning that we seek proven methodologies to make decisions and manage assets. I believe strongly that the gifts we receive in this world are merely tools to accomplish greater things. I also believe that we have a responsibility to shepherd our wealth in a way that is prudent and practical. The world of financial planning is not an exact science. We examine and probe to arrive at prudent recommendations. While there are no guarantees, and history is no assurance of future trends, there is nothing like experience to teach us not only what we should do, but, just as importantly, what we should avoid.

I believe we have succeeded because we have the tools to assist our cherished clients in managing their assets and making decisions that will make a difference in the quality of life that they and their descendants will enjoy. We are here because we like making a difference. Financial planning can be elusive and confusing. Our goal is to assist you in understanding and relating to the choices you have to make. Perhaps you are worried about running out of money, or are concerned with gifting, or maybe you just want to spend more time with your family than you do looking at your check book. In any case, we invite you to learn what "Planning Financial Freedom" means for you.

www.Integrated-Financial-Group.com

HINCHEY FINANCIAL GROUP BRANCH OFFICES

HENRY COUNTY LOCATION

350 Country Club Drive, Suite C-2
Stockbridge, GA 30281

FAYETTE COUNTY LOCATION

132 Old Norton Road
Fayetteville, GA 30215

ATLANTA LOCATION

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Securities and Advisory Services offered through LPL Financial, a Registered Investment Advisor, Member FINRA/SIPC.

HINCHEY FINANCIAL GROUP

FAMILY WEALTH MANAGEMENT

"Planning Financial Freedom!"

A proud member firm of the Integrated Financial Group, a national consortium of independent financial planners.

OUR PHILOSOPHY: PLANNING YOUR FINANCIAL FREEDOM

Planning for the future can be daunting.

- How much is enough for the future?
- Is it in the right places?
- Do I understand my pension options?
- Do I have enough insurance?
- What is Long-Term Care Insurance?
- How do I minimize my taxes?
- Am I protecting my assets from unnecessary risk?
- Is my estate positioned for an efficient transfer to my heirs?

We advise everyone to build a thoughtful plan to help accomplish your individual and family financial goals – goals like a more secure, comfortable retirement. We also believe that having a coach and experienced advisor to assist you in the process may help you improve your chances of success.

Planning your financial freedom will address these questions.

THE PLANNING PROCESS

We can help with advice and guidance.

At different stages in our life, we can all benefit from varying degrees of advice and guidance. Our team has experience assisting our clients through just about every phase of the human condition and of the financial life cycle. It's this experience that you can tap into through our financial planning process.

Whether you need a comprehensive financial plan, or just a 30-minute "*what if*" consultation, we're ready to listen. Just as no two fingerprints are identical, no two clients have the same expectation. Our free initial consultation is the opportunity for us to get to know you, and for you to assess us.

From there we can determine how to be of assistance. Whether your concern relates to running a business, or how to budget for one's college expenses, we will present customized solutions. The planning process may include one or all of the following items along the way:

RETIREMENT PLANNING
Including Distribution Assessment

COLLEGE PLANNING
Including Funding and Asset Leverage

ESTATE PLANNING
Including Document Coordination & Review

ASSET AND INVESTMENT MANAGEMENT
Including Portfolio Review and Design

RISK MANAGEMENT
Including Life, Disability and Long-Term Care Insurance Evaluation

OUR CLIENT'S *BILL OF RIGHTS* – WHAT YOU CAN EXPECT FROM US

Individuals and families seeking our professional assistance in managing their financial resources and achieving their personal goals, can expect:

- To employ persons with financial expertise.
- To employ someone who listens and hears all my needs and concerns.
- To employ someone who will help me prioritize short-term and long-term goals and objectives.
- To employ someone who will critically evaluate a variety of investment and insurance products assuring unconditional suitability.
- To employ someone who strives to deliver quality performance when servicing my financial needs.
- To employ someone who respects my money the way I do.
- To employ someone who will deliver information to me in a way I can understand.
- To employ someone who will remain current regarding developments in law, taxation, economics and practice technology.
- To employ someone, like me, who is working towards a long term relationship.

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