



HLM FINANCIAL SERVICES

Financial Planning
Retirement Planning
College Planning Services

ALL SERVICES →



We start with the basics of your unique financial situation, beginning with where you are now, and look forward into the future. We are prepared to guide you through complex decision-making processes, such as asset allocation, retirement and college education funding, financial planning, and investment performance review. We are committed to working together to achieve your goals. We are committed to financial education and transparency. We are committed to putting you first.



Financial Planning & Wealth Management Services

At **HLM Financial Services**, a division of HLM Financial Group, we practice a hands-on approach to wealth management. Our approach to building and transferring wealth is unique and different.

Our Services

- Fee-Based Money Management
- Investment Review
- Fee-Only Financial Planning College Planning
- Annuity, Life, and Disability Insurance Options
- IRA, Pension, and 401k Plan Consulting
- Retirement Planning



Achieve Your Financial Goals

We create personalized financial plans and equity portfolios for our clients:

NOTHING IS COOKIE CUTTER.



HLM OFFICE HOURS

Monday – Thursday

8:30 to Noon, 1pm to 5:30pm

Friday 8:30 to Noon, 1pm to 3pm

CONTACT INFO

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U.S.A

BROKER DEALER DISCLOSURE

Securities offered through SA Stone Wealth Management Inc. Member FINRA and SIPC. Advisory Services offered through SA Stone Investment Advisors Inc.

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