We believe your investments should be Dynamic

We manage our investment strategies based on the market forces of supply and demand. Our strategies are systematic and seek to eliminate the emotion that can so often impact the ability to achieve success in investing.

Let us help you find a strategy that fits your goals and objectives

Some of the features of our investment strategies include the following

Ability to Act When Needed Most

We manage our investment strategies in house and can provide you with the information you need, when you need it regarding how your money is invested and how your accounts are performing. Our investment team meets once each week to review each strategy and discuss necessary changes. When changes are needed, those take place immediately for all of our clients in the impacted investment strategies. No waiting, no emotion, just action.

Real-Time Trade Alerts

We feel it is important to keep you informed of what trades are being made and how they impact your investment allocation over time. With our trade alerts sent out via email within 24 hours of placing trades, you will know all investment changes taking place inside your accounts.

Investing That Matches Your Financial Goals

We understand that each person has a different attitude about money and investing and everyone's goals are different. We work with you to determine what investment strategy may be best to meet your financial goals while also remaining open to change. Your strategy can change as your financial life changes.

Manage Ever-Changing Market Conditions

Many investment strategies lack the flexibility to adjust to potential opportunities in financial markets or to provide protection in times when it is needed most. We monitor each strategy daily to ensure that your investments meet our criteria for each strategy and that we seek out-performance over the long run through our active management style.

Do You Know What Kind of Investor You Are?

TAKE THE RISK PROFILE ASSESSMENT (/SURVEY)

FINANCIAL SOFTWARE

Simplify Your Financial Life

Charting a course to a brighter financial future does not have to be a difficult task. With our eMoney Financial Software, we provide you with the ability to track and monitor your financial life all in one place. Use the platform to stay informed and help you make better financial decisions.

Your Financial Dashboard powered by eMoney

from **Hassell Wealth Management**

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Some of the Many Features Include:

Link Outside Investment Accounts including Bank Accounts and Credit Cards

Analyze your Spending & Savings to progress towards your goals

Set & Manage Budgets

Run Detailed Reports like Balance Sheet reports and Net Worth Statements

Store critical documents in your *Secure Document Vault*

Simplify Your Financial Life Today!

REQUEST ACCESS TO YOUR FINANCIAL DASHBOARD

Plan with Us

For over 30 years we have helped individuals and families plan to meet their financial goals. We provide fee-based Comprehensive Planning and a la carte planning solutions.

Retirement Planning

Whether you are just getting started with investing and saving for your financial future or nearing retirement, we have solutions that can help you meet your financial goals with confidence. **View Sample Retirement Planning Report (/s/Sample-Decision-Center-Report_2016-10-14.pdf)**. Check out our **Social Security Analyzer (/social-security)** to help you determine when you should start Social Security and how to maximize your benefit.

Education Planning

Higher education costs continue to rise and early planning and diligent savings is essential to meet your education savings goals. There are many types of accounts you can use to help you save for college. We can help you determine the best fit for you and your family. **View Sample Education Planning Report (/s/Education-Projections_-Sample-Report.pdf)**.

Estate & Legacy Planning

We are all going to die some day. Laying the proper foundation while you're alive can help you pass a legacy on to your heirs whether that is your family or favorite charity. With our Comprehensive Planning Solution, you can achieve clarity regarding your long term planning goals. **View Sample Estate Planning Report (/s/Estate-Tax-Projection_Sample-Report.pdf)**.

DISCOVER TRUE WEALTH

Focus on the Things that Make You Smile

True Wealth is defined as the things that money can't buy and death can't take away. Our full-service approach to investing and wealth management will help simplify your financial life. We will provide the financial experience you need, so you can focus on the things that matter most.

What Do You Value Most?

Our values are a fundamental part of who we are. As we live life our values may change but it is essential to reflect on our core values to ensure that we are spending adequate time pursuing actions that align with our values.

Find Your Meaningful Purpose

So often we just find ourselves going through the motions of life without much that motivates us. Finding a purpose can be an ever-evolving process but ultimately finding a calling in life that causes you to jump out of bed in the morning is a worthy pursuit. Finding purpose can fuel your passions and commitments in addition to providing a higher meaning in your life.

Create a Vision for Your Future

Now it's time to dream a little. What does your ideal life look like? If you never ponder this question you will likely never achieve a life that serves as a source of energy and passion. Your vision must be compelling. It must be something you get excited about. Knowing what you are working for will provide the necessary motivation when inevitable obstacles arise.

Set Goals & Make an Action Plan

To move beyond the theoretical feel-good elements of thinking and planning, putting in place written goals and an action plan will provide you with the necessary steps to begin a more measured pursuit of everything up to this point. It is essential to set goals and work to achieve them. Life can throw us curve balls and some of our goals may change.

Ready to Take Action?

DOWNLOAD FREE BLUEPRINTING GUIDE (/S/BLUEPRINTING-GUIDE.2016)

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