



When hiring a financial firm, ask questions and read the small print.

Some financial firms won't put their recommendations in writing...

We do.

Some financial firms don't provide tax advice...

We do.

Some financial firms don't offer ongoing service...

We do.

"Retirement Planning Doesn't Have To Be Hard, Complicated or Stressful."

**- David Holland, CEO
Holland Financial, Inc.
Established 1997**

A Single, Integrated Source for Financial Planning

- **Financial and Retirement Planning**
- **Retirement Income**
- **Investment Advice**
- **Estate and Trust Services**

- **Annuities**
- **Long-term Care**
- **Life Insurance**
- **Income Tax Returns**



Meet our Team of CERTIFIED FINANCIAL PLANNER™ Professionals

From left to right: Angel Pinkerton, CFP®, ChFC®, CRPC®; David Holland, CFP®, CPA/PFS, CLU, ChFC®; Amy Williamson, CFP®, ChFC®, AAMS®; Kalon Hoard, CFP®, AWMA®, AAMS®.

Holland Financial has over twenty full-time team members, including:

Four CERTIFIED FINANCIAL PLANNER™ Professionals

Two Certified Public Accountants (CPAs)

One Certified Management Accountant (CMA®)

One Certified Valuation Analyst (CVA®)

HOLLAND FINANCIAL CAN HELP YOU PLANSTRONGER™ FOR YOUR FINANCIAL FUTURE AND RETIREMENT

Investment Review: We go under the hood for a 19-Point Inspection

Holland Financial will prepare an objective review of your current investments and financial position. We will analyze various aspects of your investment and insurance holdings. We will then compare the appropriateness of your existing portfolio to your risk tolerance and investment objectives. You will receive a written report of these analyses, your *19-Point Investment Inspection*, and one of our CFP professionals will review each part of the report with you and answer your questions.

We will use the results of the investment review and inspection to prepare customized recommendations for your personal situation. This guidance could include:

- **Retirement Income Planning**
- **Investment Recommendations**
- **Annuity Recommendations**
- **Long-term Care Analysis/Strategies**
- **Tax Planning**
- **Insurance Planning**
- **Account Reallocation Recommendations**

Learn more about our investment advisory services and how we can help you to **PlanStronger™**.
([advisory.html](#))

Planning is part of your everyday life. Vacations, weddings, parties – all are events you've taken time and effort to prepare for and organize. Your retirement should be no different ... so, take just one hour to **PlanStronger™**. Learn more about our planning process... ([process.html](#)).

Get Started: Call 386-671-PLAN (7526) to schedule your complimentary consultation.



19-Point Investment Inspection

An Objective Review of Your Current Investments and Financial Position

Prepared for:

David Holland
CERTIFIED FINANCIAL PLANNER™
Investment Adviser Representative
of Holland Advisory Services, Inc.



Educational Resources from Holland Financial to Help YOU PLANSTRONGER™



Plan\$tronger™

PlanStronger™ Sunday
through Friday nights at 7pm
on WDSC Channel 15. Join
host **David Holland** for great
guests and important
financial topics!

(<http://www.planstrongertv.com>)

PlanStrongerTV™

David Holland, CPA, CFP®, hosts PlanStrongerTV™, a financial variety program featuring fascinating guests and a wide array of topics – from the psychology of money to retirement planning to estate planning. Make David Holland your source for interesting information that affects your pocketbook and helps you PlanStronger™ for your financial future.

Watch a promo for an upcoming episode below or click on More PlanStrongerTV™ to explore more previews and guest interviews from episodes of PlanStrongerTV™.

National Season 3 Ep 313 Promo : Planning for Life's Big Events; and Women's Financial...



PLANSTRONGER™ Column

David Holland is an author and a financial columnist. He writes columns on personal finance. You can read his latest column, or peruse the Archives, at www.HollandColumn.com (<http://www.hollandcolumn.com/>). David has written columns on a wide variety of topics related to retirement planning and managing your personal finances. In the Archives, you will find valuable information (in plain English!) on retirement income planning, investing, life insurance, long-term care, and many more financial topics. These are issues that affect almost everyone.

[Column Archives » \(http://www.hollandcolumn.com/archives.html\)](http://www.hollandcolumn.com/archives.html)



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(<mailto:questions@planstronger.com>)

Call Us: 386-671-7526



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