Houlihan Financial
Resource Group, Ltd.

Planning For All Facets Of Your Financial Life.

A FEE-ONLY, FIDUCIARY FINANCIAL PLANNING FIRM

Houlihan Financial Resource Group, Ltd. is an independent, fee only, financial planning firm founded on the belief that the client's interest always comes first. We serve families, small business owners, and other professionals throughout the greater Washington D.C. area (Virginia, Maryland and the District of Columbia) and throughout the country.

- Put the client's best interests first
- Act with prudence, that is, with the skill, care, diligence and good judgment of a professional
- Do not mislead clients--provide conspicuous, full and fair disclosure of all important facts
- Avoid conflicts of interest
- Fully disclose and fairly manage, in the client's favor, unavoidable conflicts

A PERSONAL APPROACH TO YOUR FINANCIAL LIFE

Our success depends on you being successful in meeting your goals; it is not based simply on the rate of return of the portfolio from one quarter to the next quarter. We provide value to you by being involved in all financial decisions that affect your lives.

It is essential to provide investment education to help manage your expectations. We use an educational approach to provide information about our philosophy and style of management.

We believe that when you are proactive in looking at your future, it presents many more options for realizing your future goals and objectives. At the end of the day, that's our service...helping you to realize your goals.

Our Team Of Advisors Is Dedicated To Your Future

OUR TEAM

The most important part of what makes our firm successful is the people on our team. We are committed to providing the best service and value to help you live a richer and more enjoyable life.

The entire team takes ownership in what the firm does. When we want to create a better process, we do it together; working together to give you the best experience possible.

We never want to take you for granted. We always ask questions, such as:

- "Would I value that service?"
- "Would I want to work with us?"
- "Would I be willing to pay that price for that service?"

When you treat people the way you would want to be treated, that is always a winning combination!

HOULIHAN FINANCIAL RESOURCE GROUP HAS BEEN FEATURED IN THESE PUBLICATIONS AND MORE:

WASHINGTONIAN

AARP®

Investment Advisor — THE VOICE OF INDEPENDENTS

Financial Planning

Worth®

Houlihan Financial
Resource Group, Ltd.

Patricia P. Houlihan, CFP®

PRINCIPAL

Ryan P. Houlihan, CFA

PRINCIPAL

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ADVISOR

Rebecca L. Fick

OFFICE MANAGER

We Put The Pieces Together To Solve Your Financial Puzzle

SERVICES

Our Promise

An Integrated Approach

Financial Planning

Wealth Management

Fees

As we work together and form a strategy to help you best meet your goals, we only make recommendations and take actions that are in your best interest. We listen in order to learn about your most important relationships, goals, fears, challenges and aspirations.

We are committed to excellence in:

- **Comprehensive Financial Planning:** We create a personal financial plan based on your goals.

Bridging All Stages Of Life

CLIENT LOGIN

PROCESS

Overview

We want to help you discover what is most important to you, financially and personally. We understand that everyone's needs are different, so our approach is to put you at the center of everything we do. We analyze all major aspects of your financial life such as your full range of financial needs, your investment timeline, income & liquidity needs, as well as your willingness to take risks.

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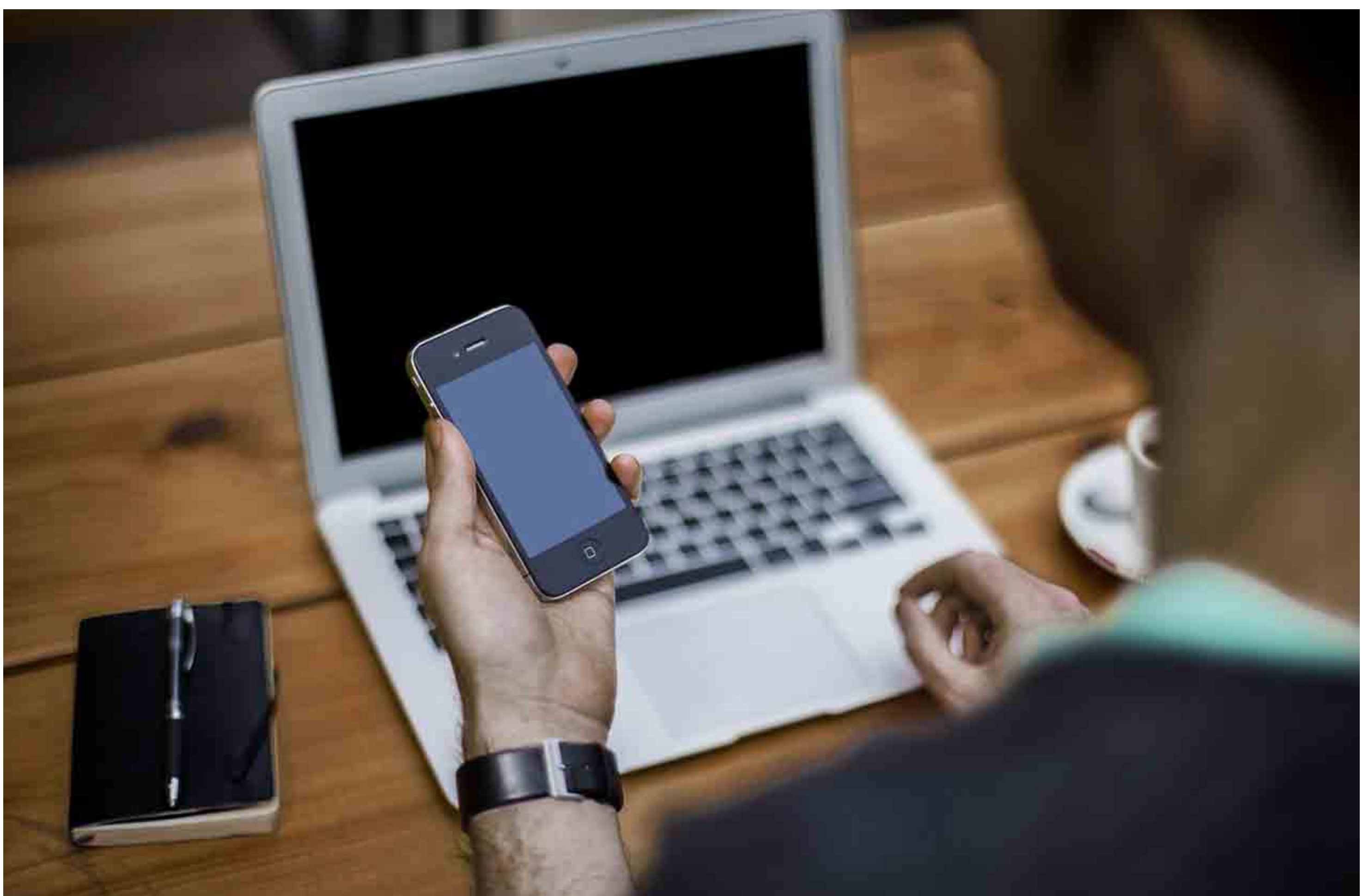

in meeting your needs. Our initial meeting is intended to get to know each other and collect data to begin the process.

Step 2 – Analysis

Before we are able to thoroughly understand your financial goals and aspirations, we first will take a holistic and comprehensive look into your current position financially, targeting your strengths and weaknesses and identifying areas of growth opportunity.

We will also analyze the effectiveness of your current portfolio, taking into account your cash flow needs, tolerance for risk, and your current portfolio composition.

Step 3 – Development

Based on our previous analysis, we will develop a long-term financial plan that will focus on taking you from your current financial state to where you want to be financially.

Step 4 - Implementation

The next step is to put your plan in action.

Your financial plan is evolving constantly, just like you. This is why it is important to keep in touch regularly.

We monitor your portfolio closely and provide you with transparent reporting. As the financial markets experience rises and falls, your portfolio will tend to fluctuate as well. Through an ongoing rebalancing, we will ensure that your portfolio maintains its target allocations. This helps to control the overall amount of risk and it minimizes the extent of emotional decision making.

CLIENT LOGIN

WHO WE SERVE

Our aim is to collaborate with you to uncover what matters most in your personal and professional life and help you to create a plan that allows you to live the life you have always envisioned. We pride ourselves on

We work with young professionals and families who are in the wealth accumulation stage of life. By working with a financial planner earlier, you are proactively positioning yourself to be better informed and potentially able to take advantage of greater opportunities. We can help you create the plan to navigate this period of your life and help you answer the questions you have about your finances. Contact us for more information.

MID-CAREER PROFESSIONALS

We want to help as you progress in your current job, change jobs, or start your own business. With change comes opportunity, but also uncertainty…

- *How will my new career path impact my lifestyle?*
- *How do I evaluate my employer's benefits package?*
- *Do I have the right investment strategy?*

NEARING RETIREMENT

After working hard and saving, you are now focused on what the future holds. But you have some concerns…

- *Do I need to save more or work longer?*
- *Should I change my investment strategy?*
- *Have my insurance needs changed?*
- *Should I pay off the mortgage?*

RETIREES

You've put your full-time career behind you. Now the fun begins! But how much is all this fun going to cost you?

- *How much can I safely spend each year without running out of money?*
- *What happens if I downsize and move to a different state?*
- *How will health care costs impact my retirement?*
- *When should I start collecting Social Security?*

RESOURCES

In the News

Check out the book Patti is featured in "Exploring Advice by Kevin Knull"

Exploring Advice Excerpt - Houlihan Financial.PDF

Fiduciary Standard article:

https://www.fa-mag.com/news/1-100-advisors-ask-sec-to-ban-brokers-from-calling-themselves--advisors-36631.html?utm_source=FA+Subscribers&utm_campaign=c30a5338bb-FAN_Breaking_News_Kestra_LG_011218&utm_medium=email&utm_term=0_6bebc79291-c30a5338bb-222248289

Letters to the SEC

Letter to SEC.pdf

Houlihan Financial Resource Group, Ltd.

Market Data

Bloomberg YAHOO! FINANCE CNBC

Newsletter

2019

- First Quarter of 2019

2018

- First Quarter of 2018
- Second Quarter of 2018
- Third Quarter of 2018
- Fourth Quarter of 2018

2017

- First Quarter of 2017
- Second Quarter of 2017
- Third Quarter of 2017
- Fourth Quarter of 2017

2016

- First Quarter of 2016
- Second Quarter of 2016
- Third Quarter of 2016
- Fourth Quarter of 2016

2015

2014

- First Quarter of 2014
- Second Quarter of 2014
- Third Quarter of 2014
- Fourth Quarter of 2014

Houlihan Financial
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Thanks for visiting our site, we'd love to hear from you today.

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