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ASCEND Intelligent Portfolios

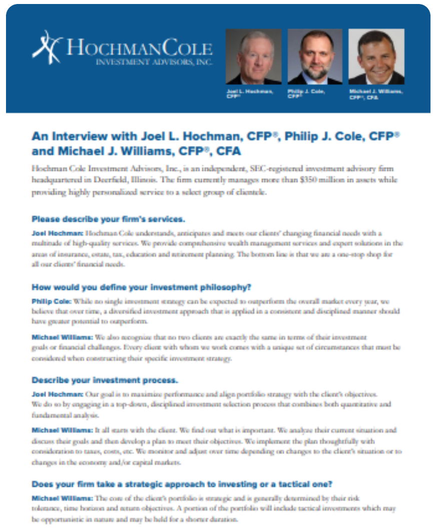
At Hochman Cole Investment Advisors, It's All About You

Hochman Cole Investment Advisors is a fee-based SEC registered investment advisory firm specializing in retirement planning for individuals and small businesses. As a boutique investment advisory firm, we offer service that is personal, private and exclusive. We aspire to have only a limited number of clients, but to provide personal service and attention to each one of them.

- We take the time to understand your investment goals and how you feel about your money.
- We will examine where you are financially today versus where you want to be in the future, and then we will create a detailed investment plan to get you there.
- Your portfolio is tailored to your goals and your ability to withstand market losses.
- Your portfolio is monitored and you receive reports quarterly about performance.
- As a privately-held independent advisory firm, our advice is not influenced by a corporate parent and we are free to choose the right solutions for you.

Watch Video

Interview with Joel Hochman, Phil Cole & Mike Williams



HochmanCole
INVESTMENT ADVISORS, INC.

Joel L. Hochman, CFP®
Philip J. Cole, CFP®
Michael J. Williams, CFP®, CFA

An Interview with Joel L. Hochman, CFP®, Philip J. Cole, CFP® and Michael J. Williams, CFP®, CFA

Hochman Cole Investment Advisors, Inc., is an independent, SEC-registered investment advisory firm headquartered in Deerfield, Illinois. The firm currently manages more than $350 million in assets while providing highly personalized service to a select group of clientele.

Please describe your firm's services.

Joel Hochman: Hochman Cole understands, anticipates and meets our clients' changing financial needs with a multitude of high-quality services. We provide comprehensive wealth management services and expert solutions in the areas of insurance, estate, tax, education and retirement planning. The bottom line is that we are a one-stop shop for all our clients' financial needs.

How would you define your investment philosophy?

Philip Cole: While no single investment strategy can be expected to outperform the overall market every year, we believe that over time, a diversified investment approach that is applied in a consistent and disciplined manner should have greater potential to outperform.

Michael Williams: We also recognize that no two clients are exactly the same in terms of their investment goals or financial challenges. Every client with whom we work comes with a unique set of circumstances that must be considered when constructing their specific investment strategy.

Describe your investment process.

Joel Hochman: Our goal is to maximize performance and align portfolio strategy with the client's objectives. We do so by engaging in a top-down, disciplined investment selection process that combines both quantitative and fundamental analysis.

Michael Williams: It all starts with the client. We find out what is important. We analyze their current situation and discuss their goals and then develop a plan to meet their objectives. We implement the plan thoughtfully with consideration to taxes, costs, etc. We monitor and adjust over time depending on changes to the client's situation or to changes in the economy and/or capital markets.

Does your firm take a strategic approach to investing or a tactical one?

Michael Williams: The core of the client's portfolio is strategic and is generally determined by their risk tolerance, time horizon and return objectives. A portion of the portfolio will include tactical investments which may be opportunistic in nature and may be held for a shorter duration.

Let's Get Acquainted

We offer a complimentary "Get Acquainted" meeting to see if we are the right fit for you.

Contact Us →

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