

# ASSET MANAGEMENT

A complete array of services that integrates tax planning and investment planning to deliver a personal, guided experience for your financial journey is available at Gregory, Sharer & Stuart. When partnering with HK Financial Services (HKFS), we provide an independent, objective approach with your needs at the forefront. Elements of modern portfolio theory are employed across a diverse roadmap of growth and income investments in an effort to maximize return while minimizing risk.

## GUIDANCE

- Experienced advisors working in partnership with your CPA
- Knowledgeable and dedicated team to help your advisor and CPA implement your plan
- Ongoing account review to help you meet your financial goal

## PLANNING

- Establish goals and objectives
- Decide on appropriate asset allocation
- Make investment selection
- Rebalance accounts
- Review and adjust contributions

## STRATEGIES

- Tax-sensitive investment planning integration with your CPA
- Holistic, independent and objective advice for your entire financial plan
- Investment oversight from a dedicated investment advisory committee
- Flexible portfolio design for your unique needs

## WHY GREGORY, SHARER & STUART AND HKFS?

Gregory, Sharer & Stuart partners with HKFS, a wealth management company that specializes in accounting and law firm clients. HKFS works seamlessly with us to offer you an all-encompassing and guided approach to financial planning. HKFS is ranked as a top 50 Fastest Growing RIA<sup>1</sup> and top 100 Wealth Manager<sup>2</sup> in Forbes magazine.

<sup>1</sup> Forbes magazine dated 11/2016

<sup>2</sup> Forbes magazine dated 05/2016

Securities offered through ProEquities, Inc., a Registered Broker Dealer and Member FINRA and SIPC. Advisory Services offered through HK Financial Services (HKFS), a Registered Investment Advisor. Insurance products offered through many highly rated carriers. HKFS is independent of ProEquities, Inc. 6084288



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**YOUR FINANCIAL NAVIGATION PARTNER**