



HALCYON'S RIA OFFERING

REGISTERED INVESTMENT ADVISORY



ENCOURAGE FINANCIAL HEALTH WHILE DIVERSIFYING INCOME

Provide 360 degree financial planning and wellness.

Most home purchases are driven by life changing events such as expanding a family, starting a new career, or retiring! Halcyon, in partnership with GoPlan101, provides a unique service to offer borrowers financial health advice for long term planning on these events.

- Having a baby? Have you thought about a college savings plan?
- Moving from NY to FL? Congratulations on your retirement. Have you thought about where you're rolling your 401K?

BENEFITS

- Free service to customers addressing their finances with a Registered Investment Advisor
- Receive a portion of the reoccurring revenue for years in the future
- Convert transactional relationships into long-term customers
- Diversify revenue from the risks of rising interest rates
- Provides income to smooth transactional business
- The average return for these products (529 college savings plan, 401K rollover, etc.) lasts for 21 years

ABOUT OUR RIA

A national advisory firm with:

Client Assets\$64.4B

Client Retention.....97%

Office Locations.....97

Fully vetted process

addressing both

RESPA and FINRA

OUR SERVICES ARE TAILORED TO YOUR CLIENT'S NEEDS



Advisors

Personalized Planning from Independent Financial Advisors



Content

Articles, Videos, Courses, Webinars & Continuing Education



Software

Financial Planning Software



Multi-Solution

Trusted Third-Party Solutions

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SCAN HERE TO BOOK A MEETING