

HK FINANCIAL SERVICES

For many, the path to planning can be overwhelming and difficult to navigate. To ensure a smoother ride, HK Financial Services (HKFS) can guide you through the entire wealth management process including tax planning, estate planning and wealth management.

CONNECTING TAX ADVICE TO WEALTH MANAGEMENT

HKFS collaborates with your trusted CPA to provide a holistic approach to your wealth management needs. HKFS has been recognized by *Forbes* magazine, *Accounting Today*, *Financial Advisor* (FA) magazine and other publications as a top wealth manager in the country.

HKFS offers a comprehensive approach to wealth management called Guidance Planning Strategies (GPS).

GUIDANCE YOU CAN TRUST

To experience a holistic approach to planning, coordinating with your CPA is essential.

PLANNING YOU CAN UNDERSTAND

Navigating your destination points and making adjustments as needed provides clarity for your journey.

STRATEGIES THAT MAKE A DIFFERENCE

Comprehensive advice generates financial options unique to your situation.



Your future.

SERVICES

ASSET MANAGEMENT

Your unique investment strategy is designed based on what is most important to your goals, your dreams and your time horizon. We use a highly qualified investment advisory committee to provide oversight and management of your investments by navigating the nuances of the market landscape.

RETIREMENT PLANNING

In the course of helping you navigate your financial future, we can review your retirement plan and make certain you are on track for a comfortable retirement.

INSURANCE PLANNING

You are protected along the way with a full risk assessment which offers advice to protect you, your family and your business.

ESTATE PLANNING

You can build, manage and preserve your wealth with our full range of strategies and solutions.

TAX PLANNING

Collaboration with our wealth management team and your tax advisor provides you with a distinct advantage in your planning process.



YOUR FINANCIAL PLANNING CONSULTANT

We recommend an objective review and analysis of your investment and insurance portfolio to ensure it is appropriate to your goals, adequately diversified, and performing competitively.

Contact your CPA or an HKFS financial planning consultant for more details.



Scott Walloch, CPA, CFP®

Financial Planning Consultant
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Scott works directly with CPAs to assess the financial situations of their clients and develop strategies to create, protect and transfer wealth through the implementation of insurance and investment vehicles. He is responsible for territories within Indiana.

Investment advisory services offered through HK Financial Services (HKFS), a Registered Investment Advisor. Commission-based securities products are sold by ProEquities registered representatives and offered through ProEquities, Inc., a Registered Broker-Dealer and member FINRA and SIPC. Insurance provided through many highly rated carriers. HKFS and ProEquities are independent of each other. 1743962



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