Which service level is right for me?

HILLfOLIO

Get Wealthy

Goal-oriented professional, building towards financial independence, you are interested in developing a strategic action plan for your financial life, and working with a trusted professional to help you as you build your wealth.

- Trusted advisor to call when you have a question.
- Financial plan including wealth report, savings and spending analysis, and systematic contribution plan.
- Portfolio of investments that match with your goals and risk profile.
- Specialized guidance on education planning, handling lumpy income, and tax minimization.
- Annual review of your plan.
- Educational one-pagers, videos, quarterly letters.

LEARN MORE ABOUT HILLFOLIO
hillfolio.com

Asset level: $200k - $2MM

HILL INVESTMENT GROUP

Be Wealthy

Committed saver looking to create an indestructible pension. You have done the hard work of building significant wealth interested in optimizing your plan to serve your larger goals.

- Trusted team of investment advisors and wealth planners.
- Financial plan including proprietary Family Profile and Longview Analysis tools.
- Portfolio of investments in line with your goals and risk profile, incorporating advanced tax management techniques.
- Coordination with tax accountant, estate attorney, bookkeeper, and other financial professionals.
- Specialized guidance on charitable giving, proactive estate and tax planning.
- Semi-annual review of your plan.
- Educational one-pagers, videos, quarterly letters, and invitation-only events.

LEARN MORE ABOUT HILL
HillInvestmentGroup.com

Asset level: $2MM - $20MM

HILLTOP

Stay Wealthy

Multi-generational family working with complex wealth transfer challenges. You have an eye towards a simpler, streamlined financial life. Looking for a modern family office - fresh feel, innovative solutions.

- Trusted team of investment advisors and wealth planners who specialize in understanding your unique circumstances, and working intimately with you and your family to solidify and protect the wealth you have created.
- Financial plan including proprietary Family Profile, Longview Analysis tools, and Wealth Map tools.
- Comprehensive investment management including liquid assets and cash, personal use assets or collections, and illiquid or closely-held assets.
- Coordination among family members and financial professionals, including your existing family office.
- Creative, innovative solutions for charitable giving, proactive estate and tax planning.
- Quarterly review of your plan.
- Educational one-pagers, videos, quarterly letters, and invitation-only events.

LEARN MORE ABOUT HILLTOP
HilltopFamilyOffice.com

Asset level: $20M+

tel. 855 414 5500
info@hillinvestmentgroup.com
hillinvestmentgroup.com