



ASSET MANAGEMENT

THE INVESTMENT PLANNING PROCESS

- Establish goals and objectives
- Decide on asset location
- Investment selection
- Rebalancing
- Review and adjust

WHY RTBH?

RTBH has partnered with HKFS, a wealth management company that specializes in CPA firm clients. Founded by the partners of Honkamp Krueger & Co., P.C., a Top 100 CPA and business consulting firm, HKFS has a thorough understanding of the special relationship between CPAs and their clients. They work seamlessly with us to offer you an all-encompassing approach to financial planning.

INVESTMENT PLANNING

RTBH provides a platform of services that integrates tax planning and investment planning to deliver a powerful difference. We partner with HK Financial Services (HKFS) to provide an independent, objective approach with your needs at the forefront. Elements of modern portfolio theory are employed by diversifying among different styles of growth and income investments in an effort to maximize return while minimizing risk.

YOU WILL RECEIVE:

- Tax and investment planning integration with your CPA
- Holistic, independent and objective advice for your entire financial plan
- Ongoing account review
- High-level service
- Experience and education
- Dedicated investment advisory committee providing investment oversight

Securities offered through ProEquities, Inc., a Registered Broker Dealer and Member FINRA and SIPC. Advisory Services offered through Honkamp Krueger Financial Services, Inc., a Registered Investment Advisor. Insurance products offered through many fine carriers. Honkamp Krueger Financial Services, Inc., is independent of ProEquities, Inc. Approval No. 100416



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