

# Wealth Management

## Wealth management is a thorough but accessible process that addresses all aspects of your financial health.

At HawsGoodwin Wealth, we take a holistic look at your finances and develop a plan based on your goals for each area of your financial life. We leverage investment management strategies, our team of CERTIFIED FINANCIAL PLANNER™ professionals, and our network of estate and tax planning professionals to help you achieve that plan over the long term.

### Our Investing Principles:



**PROTECT WHAT YOU'VE BUILT**



**DIVERSIFY**



**INVEST FOR YOUR GOALS**



**REVIEW & REBALANCE**

### Wealth management includes:

- **Financial Planning**
- **Investment Management**
- An advisor who will listen to you and guide you, so that your goals are in focus while growing your financial knowledge

### The Process of **Financial Planning**

#### 1. Establishing & Gathering

Together, we determine your core needs and we compile data on your financial life, including discussing or refining your goals.

#### 2. Analyzing & Developing

We take a deep dive into your current financial status and make recommendations or alternative suggestions on how to work together to meet your goals for the future.

#### 3. Implementing and Monitoring

The recommendations we develop with you are put into action, with regular monitoring to ensure their effectiveness, and continual communication on their status. We also tap into our network of advisors and advanced planning professionals in order to ensure you a high level of effective service.

Your resulting financial plan works in concert with investment management to help your goals succeed.

When it comes to investment management, HawsGoodwin Wealth has one main goal: to sustainably grow your portfolio as we coordinate and oversee it. From tax-advantageous strategies to rebalancing, we grow your assets while minimizing risk.

## The Practice of **Investment Management**

### 1. Asset Management

We work to grow and protect your assets over the long term, with regular review and disciplined rebalancing, and special attention given to tax strategies.

### 2. Risk Management

We analyze your personal risk tolerance, liabilities such as debt, and insurance needs in order to build a holistic portfolio right for your needs.

### 3. Awareness Management

Over time, we work with you to promote understanding of the history, psychology, and business of investing as it relates to your specific financial goals.

**Our firm is focused on helping clients responsibly enjoy the wealth they have built.** We do our best work as advisors for people, businesses, and families who have worked hard to build wealth and are now looking to grow it and protect it. Our thorough but accessible process addresses all aspects of your financial picture over the long term, led by your financial plan.

## ABOUT THE FIRM

### FOUNDING DATE

August 1, 2008

### HEADQUARTERS

Franklin, TN

### FOUNDERS

Art Haws, CFP®  
Cam Goodwin, CFP®, CPFA

Registered Investment Adviser  
HawsGoodwin Wealth is laser-focused on delivering high-value, unbiased wealth management services that enrich our clients' lives. Our team of CERTIFIED FINANCIAL PLANNER™ professionals work as a team to guide individual investors and corporate clients alike through the financial decisions that matter.



Top  
**Financial  
Advisers**  
2019\*

FT 300 Ranking June 2019

HawsGoodwin Wealth is proud to be ranked in the **FT 300: Top Registered Investment Advisers of 2019.**

**Make your mark.**  
**Together, we'll make sure it lasts.**  
**Get in touch for a complimentary consultation today.**

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HawsGoodwin Investment Management, LLC (HawsGoodwin Wealth) is an independent investment adviser registered under the Investment Advisers Act of 1940, as amended. Registration does not imply a certain level of skill or training. More information about HawsGoodwin Wealth, including our investment strategies, fees, and objectives can be found in our ADV Part 2, which is available upon request.

\*The Financial Times 300 Top Registered Investment Advisers is an independent listing produced annually by the Financial Times (June 2019). The FT 300 is based on data gathered from RIA firms, regulatory disclosures, and the FT's research. The listing reflected each practice's performance in six primary areas: assets under management, asset growth, compliance record, years in existence, credentials and online accessibility. This award does not evaluate the quality of services provided to clients and is not indicative of the practice's future performance. Neither the RIA firms nor their employees pay a fee to The Financial Times in exchange for inclusion in the FT 300.