THE H GROUP INC®

OUR CLIENTS

Our advisors are proud to serve our wonderful clients.

We are dedicated to helping you build and protect your wealth—and realize the life you envision. When you become a client, your goals become our goals.

Most of our clients are financially comfortable retirees and/or successful individuals who have accumulated significant assets. They are conservative-to-moderate risk takers, and the majority of them were referred to us by another client or professional. Our clients appreciate our knowledge and expertise, but it is our genuine care and concern for them that they value most.

We do have asset minimums, and like most things in life, they're flexible. Our clients generally come to us with at least $500,000 of investable assets. More important than a dollar amount is whether or not our service model aligns with your needs. We will not work with people for whom we cannot add value.

COULD WE BE THE RIGHT FIT FOR YOU?

While everyone has unique needs and individual personalities, we've found that each and every one of our clients:

1. **Value highly credentialed advisors** – Our advisors have worked hard to earn the Certified Financial Planner and Accredited Investment Fiduciary designation. (Only 28% of all financial advisors hold their CFP credentials.)
2. **Seek comprehensive financial planning** – We are focused on long-term planning (tax, retirement, estate, insurance planning) relating to all assets our clients hold.
3. **Want an advisor who does not have undisclosed conflicts of interest** – Our firm is intentionally fee-only and thus we are not incentivized to promote any particular solution. Whether we're sitting down for our first meeting or our 50th, you can rest assured that—as your fiduciaries—we are putting your interests first.
4. **Appreciate open communication and a lifelong advisor relationship** – We want to know our clients on an ongoing basis; this means we keep our doors—and ears—open to them at all times.
5. **Like having an advisor who will help educate them** – We are happy to take the time to make sure our clients understand why we are recommending a specific strategy or course of action.

CONTACT ONE OF OUR ADVISORS:

Albuquerque, NM
505-346-343
5600 Eubank Blvd NE #260
Albuquerque, NM 87111

Bellevue, WA
425-827-6236
11400 SE 8th St., #235
Bellevue, WA 98004

Boise, ID
208-853-7770
6126 W State St., Ste. 506
Boise, ID 83703

Portland, OR
503-292-5853
3395 SW Garden View Ave
Portland, OR 97225

Salem, OR
503-371-3333
500 Liberty St SE Suite 310
Salem, OR 97301