



HORIZON
INVESTMENTS

Success Strategies for **Entrepreneur IFAs** TM

(Trends and Strategies)



Horizon Investments:

Provide goals-based investment management strategies that will **empower financial advisors** to help their clients achieve their most important financial objectives throughout life.

SUCCESS STRATEGIES

- Develop an ideal client profile
- Develop financial planning / financial problem solving skills and capabilities
- Incorporate account aggregation and financial information management
- Develop a goals-based investment approach

continued>

SUCCESS STRATEGIES **continued**

- Focus on the right brain emotional, experiential, social relationship side of the business. Deliver an exceptional client experience
- Develop a more consistent and modern approach to marketing and client acquisition
- Develop a set of service offerings and strategies that promote inter-generational wealth management opportunities



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Connect with Horizon

Please call or email to discuss more about how we can serve you.

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HORIZON INVESTMENTS

- Founded: 1995
- Located: Charlotte, North Carolina
- Assets under management (with affiliates): ~\$3.5 billion
- Heritage: financial planning and investment advisory services for a regional clientele
- Goals-based investment management for independent financial advisors
- Consultative approach to working with advisors
- Commitment to helping advisors build successful businesses

Disclosures

Horizon Investments' strategies are subject to general market risk and risks related to currency fluctuations and economic conditions. Each strategy's underlying investments fluctuate in price and may be sold at a price lower than the purchase price resulting in a loss of principal. Investors may lose money. The underlying investments are neither FDIC insured nor guaranteed by the U.S. Government. There may be economic times where all investments are unfavorable and depreciate in value. Please evaluate your clients' circumstances and risk tolerance to understand if these investments are right for them. Tax considerations are not taken into account.

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