



ONE

Consulting Services

The industry is evolving. Complexity is increasing and disruption seems to be the new normal. Running your own advisory practice and your own investment models can be challenging. The good news is you don't have to go it alone.

Disruptive Wealth Management Trends

- ▶ Regulatory Pressures
- ▶ Technology Advances
- ▶ Demographic Shifts
- ▶ New Client Expectations
- ▶ Product Complexity
- ▶ Market Volatility

Industry Insights, Actionable Strategies

Gain access to deeper investment analytics and institutional research capabilities that can extend the integrity of your current business model. Horizon One's collaborative approach helps ensure you have a defined, documented and deliberate process for how you build and manage portfolios.

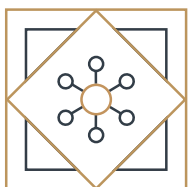
Modernize and Grow

Modernize and scale your business with a customized investment framework, supported by technology that connects your solutions to a client's financial plan.

ONE Approach

Benefit from convenience and choice while staying fully in control of decision-making.

Horizon One is focused on empowering your independence. Our goal is to provide customized and objective investment research to enhance your current process.



Discovery



Current Model Analysis



Initial Model Proposal



Model Refinement/Implementation



Ongoing Support

Here for you quarter over quarter, year over year.

A dedicated team will work with you to get to know your practice inside and out in order to deliver concierge-level support.

Robust Investment Management Support

- Customized Goals-Based Model Framework
- Dedicated Horizon One Analyst
- Structured Quarterly Investment Committee Meeting Guidance
- Investment Policy Statement Assistance
- Ongoing Manager and Fund Research
- Model Performance Updates
- Market Review and Outlook

Comprehensive Business Consultation

- Customized Marketing Support and Fulfillment
- White-Label Technology and Guidance Tools
- Practice Management and Business Strategy Consultation
- Client Meeting and Event Support
- Networking Opportunities

A Community of Empowered Advisory Firms

Gain membership to a community of financial advisory firms. It's a community where business owners are empowered to collaborate and share best practices.

Interested in learning more?

Contact us at consulting@horizoninvestments.com to set up a meeting.

Past performance is not indicative of future results. The investments recommended by Horizon Investments are not guaranteed. There can be economic times where all investments are unfavorable and depreciate in value. Clients may lose money.

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HICSF-1122