



Hengehold Capital Management Is Now HCM Wealth Advisors

New Tax Department, New Logo, Same Mission

Thirty years ago, after doing thousands of tax returns, a young CPA started a new and different kind of company. He wanted to build a business that was very different from the commission-driven stockbrokers of the day. His vision was to help clients achieve and maintain Financial Independence throughout their lives. Like the independent CPA firm from which he came, he wanted the business to act as a Fiduciary, always putting the needs of the Clients first.

He called the company Hengehold Capital Management (HCM).

He began teaching seminars by night and helping clients plan and invest by day. The business began to grow, and over the next 30 years, its role as a Trusted Advisor generally fell into three distinct areas:

- Retirement Planning
- Investment Management
- Family Office / Family CFO Services

As HCM talked with current and prospective clients about what they wanted from a firm like HCM, we learned a few things. For starters, we were on the right track with our comprehensive, fee-only, fiduciary service model. Additionally, you appreciate having a relationship with a complete service team, including members from HCM's Investment, Planning, and Operations departments. We also learned that many of you wanted more help with the other financial complexities in your lives, especially tax planning and preparation.

We listened and have now added a full-service CPA firm to the HCM Team. Instead of hearing "consult your tax advisor" as you do in most other firms, HCM can say "the tax advisor will be right in." And yes, we can now handle the preparation of your tax return, if you like.

So, with 24 team members (and counting), a multi-generational leadership team, and service offerings that go far beyond capital management, it seemed appropriate to update our name to better reflect who we are and what we do. We have referred to Hengehold Capital Management as HCM for years. We believe keeping "HCM" respects our legacy while adding "Wealth Advisors" shines a bright light on the comprehensive service offering we have developed.

I hope you like the new logo and color scheme. Please let us know what you think. If there is something you really don't care for, please be gentle, but we would seriously appreciate the input.

You probably guessed that the kid teaching seminars by night and building a business by day was me. I want to express my deepest thanks to the many clients who enjoyed our homemade chocolate chip cookies in those days and who have helped make these thirty years a great ride.

Here's to the next thirty years.

Annual Notice of our 2019 ADV Part 2 and 2B

As a registered investment advisor, we provide certain important information to you on an annual basis, which is included in this Annual Notice.

Our most recent disclosure statement, Form ADV Part 2 and 2b are now available. There have been material changes since the 03/01/2018 Form ADV Part 2 brochure as follows:

As of January 2019, we have adopted the doing business name of HCM Wealth Advisors.

If you need a copy at any time, please call us at 513.598.5120 or send an email request to info@hengeholdcapital.com. A copy is also available on our website, hcmwealthadvisors.com. Additional information regarding our firm is available at adviserinfo.sec.gov.

Invitation to Contact Your HCM Advisor

We want to hear from you. If you have experienced any changes in your life that may impact your financial situation, be sure to let us know. It's always best to meet regularly so we can discuss any changes that may affect your planning or investment objectives. It is always nice to hear from an old friend. We'd love to meet in person or schedule a conference call, whatever works best for your busy schedule.

As always, we appreciate the opportunity to work with you and we thank you for your confidence.

Sincerely,



Michael T. Hengehold, CPA/PFS MST RICP

P.S. Make sure to look for HCM's Quarterly Investment Review Webinar in your email inbox in early April.