WEISS, HALE & ZAHANSKY

STRATEGIC WEALTH ADVISORS

Plan well. Invest well. Live well. ™

PRESS KIT

2023

Company Overview

Media Resources

Contact

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whzwealth.com

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Connect

linkedin.com/company/whzwealth

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@whzwealth

Fearless Flyer E-newsletter

You & Your Money Podcast

WHZ YouTube Channel

Who We Are

Weiss, Hale, & Zahansky Strategic Wealth Advisors (WHZ) is an award-winning, independent boutique wealth management firm dedicated to empowering others to Live Well.

As a fiduciary wealth management firm, our goal is to help our clients Live Well by always serving their best interests through personalized, academic, and strategic financial planning and investments.

We are a partner of Commonwealth Financial Network®, the largest privately-owned independent Registered Investment Adviser broker-dealer in the country.

And for nine years running, every eligible advisor on our team has earned the Five Star Wealth Manager Award – a recognition given to only 10% of wealth manager candidates in Connecticut.

2022 Five Star Wealth Manager Award,
created by Five Star Professional. The 2022 award was presented in November 2022 based on data gathered between February 2022 and September 2022. A total of 2950 Connecticut-area wealth managers were considered for the award; 290 (10% of candidates) were selected to receive it. Wealth managers do not pay a fee to be considered or selected for the award. (Fee paid for use of marketing materials.) Not indicative of advisor's future performance. Your experience may vary. For more information, visit fivestarprofessional.com.

Founded
In
2006

Location
CT
Pomfret
& Tolland

Advisory Area
25
States

Experience
65+
Years
Combined

Assets Under Advisory
$450+
Million

Team
12
& Growing

Mission

We deliver the best wealth management experience for every client, every time, at every touchpoint.

Values

We fulfill that mission by embracing six core values that form the heart of our client experience philosophy and set us apart from other wealth management firms. We are:

Independent

We create a personalized financial plan specific to each client's unique goals and values so they can ultimately Live Well.

Strategic

Our Plan Well. Invest Well. Live Well.™ process is centered around the client's long-term financial life goals.

Consistent

We deliver high-quality service across all dimensions of the client experience for every client, every time.

Principled

We dedicate ourselves to achievement of our clients' strategic financial plan, because the integrity of our team and the satisfaction of our clients are our highest priorities.

Academic

We combine proven economic and investment strategies with our knowledge of the capital markets to minimize controllable risk and achieve clients' unique financial plan.

Approachable

Our team is dedicated to building meaningful relationships through which our clients are valued and our community is empowered to Live Well.

We're also invested in helping to better the broader community through a strong commitment to diversity, equity and inclusion and meaningful community involvement.

What We Do

We help people Live Well through personalized, strategic financial planning and portfolio management partnerships that help our individual, institutional, and business clients achieve their financial and life goals.

SERVICES

- Portfolio Management
- Retirement Income Planning
- Financial Planning
- Education Planning
- Investment Analysis
- Succession Planning
- Estate Planning
- 401(k) and 403(b) Plan Analysis
- Insurance Analysis
- Custom Consulting

INVESTMENTS

- IRAs — Traditional and Roth
- Mutual Funds
- Bonds
- Stocks
- Municipal Bonds
- ETFs
- REIT's (Alternatives)
- Annuities/CDs
- Insurance – Disability, Term and Long-Term care
- Private Equity

ACCOUNTS

- Retirement
  - IRA Rollover
  - Traditional IRA
  - ROTH IRA
  - SEP and SIMPLE IRAs
  - 401(k), 457, 403(b)
- Non-Retirement
- Education Accounts
- Endowments
- Trusts
- Corporate

Who We Serve

Individuals in The "Balancing Act" Years

The first phase of your wealth journey is based on earning and building. Navigating adulthood means balancing and prioritizing: What's most important? What do you pay first? Does an ongoing pandemic mean changing your plans? We will work with you to design solutions, strategies, and financial vehicles to help you balance your career, family, and leisure, all to help you feel confident that you're achieving what you want.

Individuals in "The Next Chapter" Years

Congratulations as you approach the end of work-as-you-know-it. Transitioning from your focus on work into family time, leisure time and passion projects is a well-deserved reward to a career well-spent. It also warrants professional guidance, especially in a post-pandemic world. We've spent decades advising on retiring strategically, and this year we're walking our clients through the big twist: is it still the right time?

Business Owners, Executives & Nonprofits

You've worked hard to make your business into your most important financial asset. We're here to help you leverage its value into the next phase of your life. We advise on business strategy, retirement plans, succession planning and more, to help business owners maximize profitability and realize the value they've worked so hard to attain. You and your family deserve the perks of comprehensive financial planning.

Why We're Different

Our Process & Partnership

Plan Well, Invest Well, Live Well™ is our strategic financial planning and wealth management process.

We developed this process based on extensive research using the most up-to-date tools available. It relies on a consistent and disciplined partnership approach to guiding our clients toward achieving their financial life goals so they can ultimately Live Well – now and in the future.

1 Plan Well

The first step is knowing where you want to go. We begin with an open and straightforward conversation with our clients about their goals, and then develop a detailed plan prioritizing what steps they should take to achieve them.

2 Invest Well

Next, we utilize proven academic research to construct portfolios that are diversified, cost-effective, tax-aware, and risk-adjusted with the aim of achieving our clients' individual goals over time.

3 Live Well

We know money is more than just an asset - it's an important resource to living the life you want. The ability to fearlessly pursue goals and live well is the ultimate payoff of our Plan Well, Invest Well, Live Well™ strategic process – and we're there to guide our clients through whatever life may bring, every step of the way.

Media Resources

Perspective
on news from the financial markets

Commentary
on current economic conditions and future outlook

Insights
on investing, financial planning, and strategy for every stage of life – from millennials to retirees – and for business owners and executives from start-up through succession

Media Experience
across all channels, from print, to radio, TV, podcasts and other streaming media

Press Room

whzwealth.com/media

- Get fast access to our expertise.
- Access commentary, video, images, and logos.
- Join our media list to receive our latest news.

Meet Our
THOUGHT LEADERS

Meet Our Thought Leaders

Available to speak about:

- Market outlook and trends
- Market volatility and navigating market fluctuations
- Financial strategies for high-net-worth individuals, pre- and post-retirement
- Estate planning and tax efficiency

Laurence Hale, AAMS, CRPS®

Principal/Managing Partner and Chief Investment Officer

- Leads WHZ's Investment Committee and portfolio management
- Former appointed member, CT Investment Advisory Council (IAC)
- Commonwealth Financial Network President's Club advisor — a distinction based on annual production that places him among the top 20 percent nationally among CFN-affiliated advisors
- Co-chair, YMCA of Greater Hartford's Investment Committee
- Member, Hale YMCA Youth & Family Center's Board of Advisors
- Past president, Quinebaug Valley Community College Foundation
- Former trustee, Day Kimball Healthcare
- On a personal note:
  Laurence is active with several non-profit and charitable organizations and has made a notable community impact through his family's foundation, the Newell D. Hale Foundation. In his downtime, he enjoys boating and spending time with his wife Jane and their three children.

Read more and see commentary by Laurence >

CALL EMAIL CONNECT

Available to speak about:

- Financial planning and strategy for business owners and senior executives
- Economic changes and impacts to portfolios and financial plans
- Healthcare/pharmaceutical company financial planning and market news

James Zahansky, AWMA®

Principal/Managing Partner and Chief Goal Strategist

- Leads WHZ's practice strategy, client acquisition and retention strategies, team leadership and innovation initiatives
- Joined the firm in 2014 after 17 years as a senior executive for major US pharmaceutical brands
- Advises business owners/executives on financial planning and strategy
- Appointed to Bryant University's Wall Street Council
- President, Northeastern Connecticut Chamber of Commerce
- Trustee, Greater Hartford YMCA
- Director, Day Kimball Healthcare
- Former director, Quinebaug Valley Community College Foundation
- On a personal note:
  Jim holds a degree in Business from Bryant University and the designation of Accredited Wealth Management Advisor® (AWMA®) from the College for Financial Planning. He is a Connecticut native, currently residing in Pomfret, where he enjoys cycling and spending time with his wife Melissa and their three children.

Read more and see commentary by Jim >

CALL EMAIL CONNECT

Available to speak about:

- Women in Finance
- Wealth-building for women
- Wealth-building for millennials
- Financial planning for transitional life changes such as divorce or job changes

Leisl L. Cording, CFP®, CDFA®
Senior Vice President, Financial Advisor

- Featured in FORTUNE Magazine's "5-Star Wealth Advisors Under 40"
- 15 years experience working with high-net-worth individuals
- Began her career in the trust and investment services department at U.S. Trust, where she managed client relationships from $1M to $1B
- Helped to establish a wealth management presence in the Hartford area for People's United Bank
- Former founding member, Women in Leadership program at People's United Bank
- Member, Northeast Connecticut Women & Girls Fund Steering Committee
- Member, Putnam Business Association
- On a personal note:
  Leisl grew up in Pomfret, CT and graduated from Woodstock Academy. She earned a degree in Finance from Quinnipiac University, where she also played Division 1 soccer. She currently resides in Willington, CT and in her spare time, enjoys playing and coaching soccer, golfing, running (including marathons), and traveling the world.

Read more and see commentary by Leisl >

CALL EMAIL CONNECT

Available to speak about:

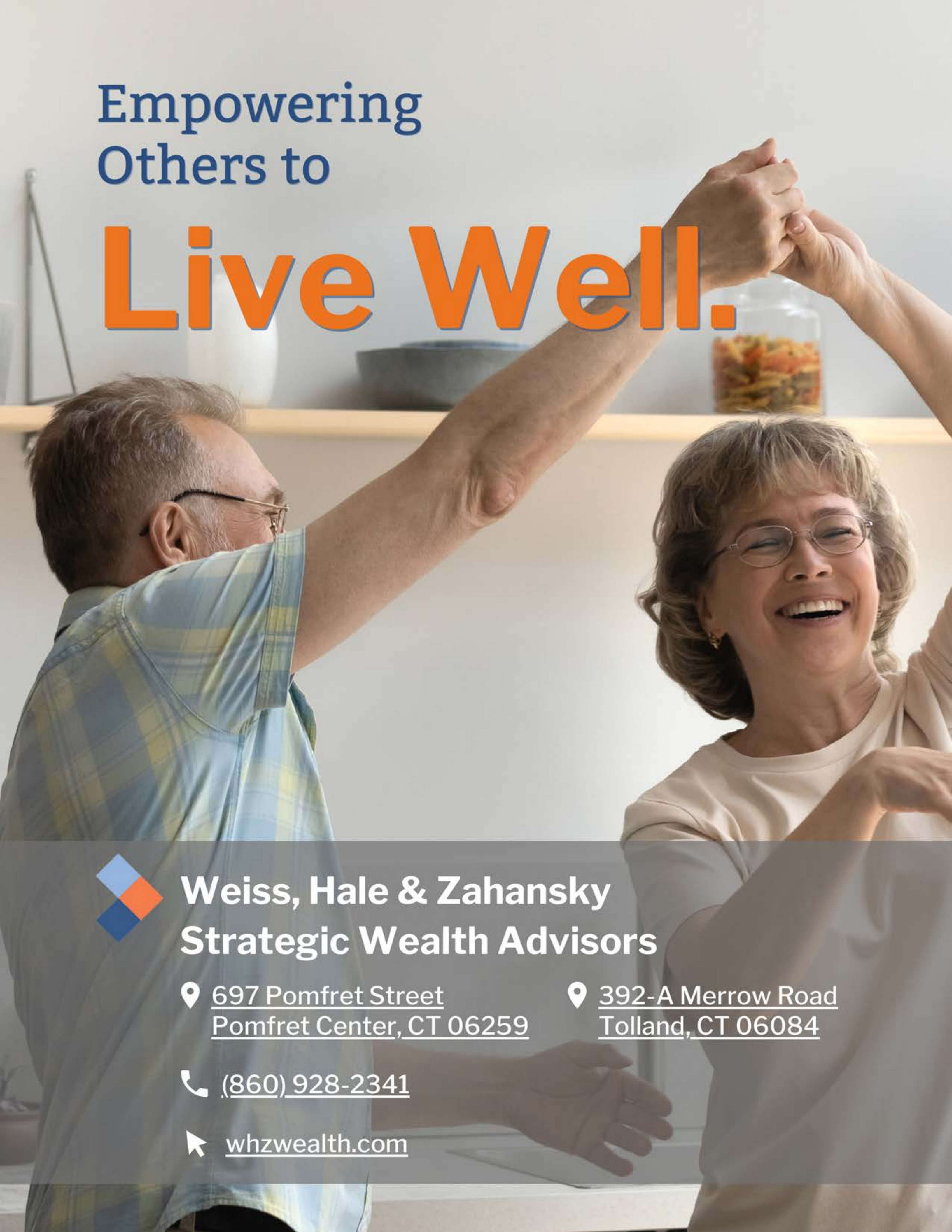
- Retirement income planning
- Financial planning for executives and C-suite clients
- Education planning
- Charitable giving strategies

Michael Baum, CFP®, RICP®
Vice President, Associate Financial Advisor

- 15 years of broad and deep financial industry experience
- Former Advanced Planning Consultant at Commonwealth Financial Network (CFN), the country's largest privately-owned independent Registered Investment Adviser /broker-dealer
- At CFN, acted as a resource on a wide variety of financial planning strategies for CFN financial advisors across the nation
- Former CFN supervisor of data integrity
- On a personal note:
  Mike earned a BS in Business Management and Entrepreneurship from the University of Connecticut and a certificate in Financial Planning from Boston University – Metropolitan College. He is a native of northeast Connecticut, currently residing in Brooklyn, CT. When he's not at work, he enjoys rooting for the UConn men's and women's basketball teams, cooking, and being active outdoors with his wife Chelsea and their twins.

Read more and see commentary by Mike >

CALL EMAIL CONNECT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