

You have dreams. Aspirations. Goals.

You may want to travel the world, or settle in your own cozy little corner. Or maybe your destination is still unknown. Wherever you are on your journey, we can help you chart your course and navigate your financial future.

THE NAUTILUS GROUP® | CARRIE HALL & ASSOCIATES
FINANCIAL AND INSURANCE SERVICES

You have sophisticated wealth management needs.

Access to accurate, well-researched information in the complex financial arena is essential for developing clarity and confidence as you develop your wealth management, estate and business plans.

- Tax Planning Strategies
- Estate & Legacy Planning
- Business Succession & Exit Planning
- Investment Management
- Special Needs Planning
- Insurance Planning
- Charitable Planning

Our Mission

We specialize in wealth management, estate, and business planning for multigenerational families. We're here to get to know you, to understand your dreams and aspirations, and to offer you state-of-the-art strategies designed to help turn your goals into reality.

We provide financial life planning based on a holistic approach.

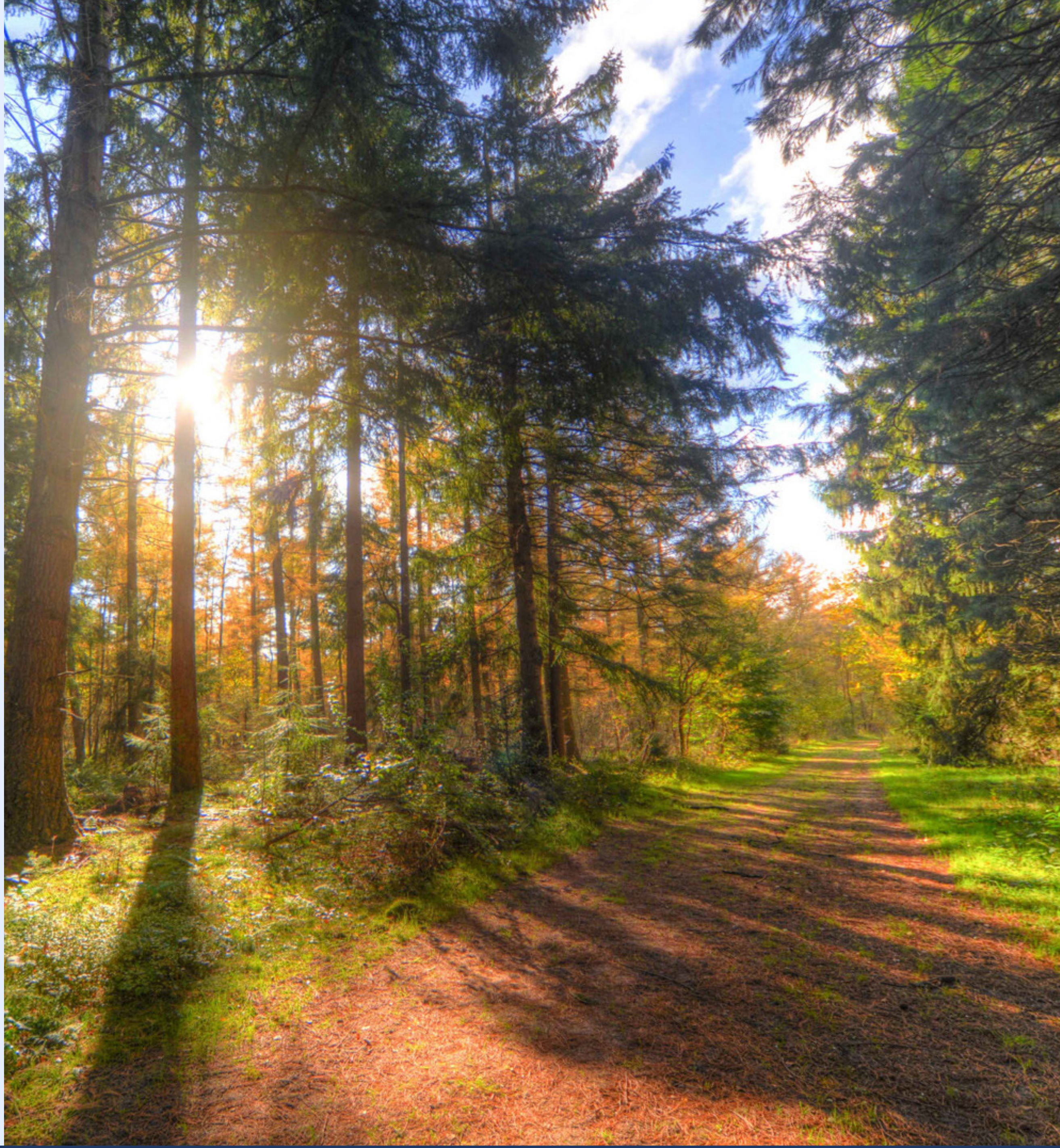
We offer a wide range of consultative services and technical case design.

- Tax Planning Strategies
- Estate, Gift & Trust Planning
- Business Succession & Exit Planning
- Charitable Planning
- Investment & Retirement Income Planning
- Executive Benefits
- Special Needs Planning
- Life Insurance Planning
- Asset Preservation & Protection
- Employee Benefits

Our Approach

Our goal is to build trusting relationships through organization and knowledge. One of the most important differences in the value we provide to our clients is our commitment to an organized team approach. We work hand in hand with you, your attorneys, accountants, and other advisors to develop and implement your plan.

This team approach provides a holistic picture of your unique financial needs and a path to implementation.



Our Strategy

It starts with understanding what's important to you.

1. Gain a clear understanding of your concerns and objectives.
2. Collaborate with your other professional advisors.
3. Utilize the industry leading resources of The Nautilus Group® and Eagle Strategies.
4. Analyze and project your personal and business financial situations.

Our Process

Through this proven process, we identify goals and analyze potential gaps. We explore possible strategies to achieve your goals and close any gaps. We then work with you for the long term, helping you implement and follow up on your chosen course of action.

1. Initial Meeting
2. Discovery
3. Design
4. Recommend
5. Implement
6. Follow Up

Our Ideal Clients

The types of clients we can best help are those who prioritize:

Financial
Peace of Mind

Family
Harmony

Business
Continuity

Creating Legacy for
Future Generations

We Specialize In Helping...

Business Owners

Corporate Executives
& Professionals

Retired Executives

High Net Worth
Individuals & Families

Farmers & Ranchers

Real Estate Developers
& Oil and Gas Interest Holders

Solid Financial Strength

Since 1988, we have partnered with New York Life Insurance Company, which enjoys the highest ratings for financial strength.*

Since 1845, New York Life has preserved its heritage while evolving and innovating to meet the needs of its clients. New York Life has stayed the course through the economic ups and downs that have defined our nation.

NEW YORK LIFE

*Individual third-party ratings reports as of 10/18/22: A.M. Best (A++), Fitch (AAA), Moody's Investors Service (Aaa), Standard & Poor's (AA+).

Estate & Business Planning Team

The Nautilus Group®

Nautilus Members are part of a select group of financial professionals across the country and have access to a dedicated team of highly qualified planning professionals and resources exclusively designed for their high net worth and affluent clients.

THE NAUTILUS GROUP®

The Nautilus Group® is a service of New York Life Insurance Company; membership is limited exclusively to the company's agents.

The team includes some of the top legal, tax, business succession, philanthropic, executive benefits, and retirement planning experts in the country.

THE NAUTILUS GROUP®

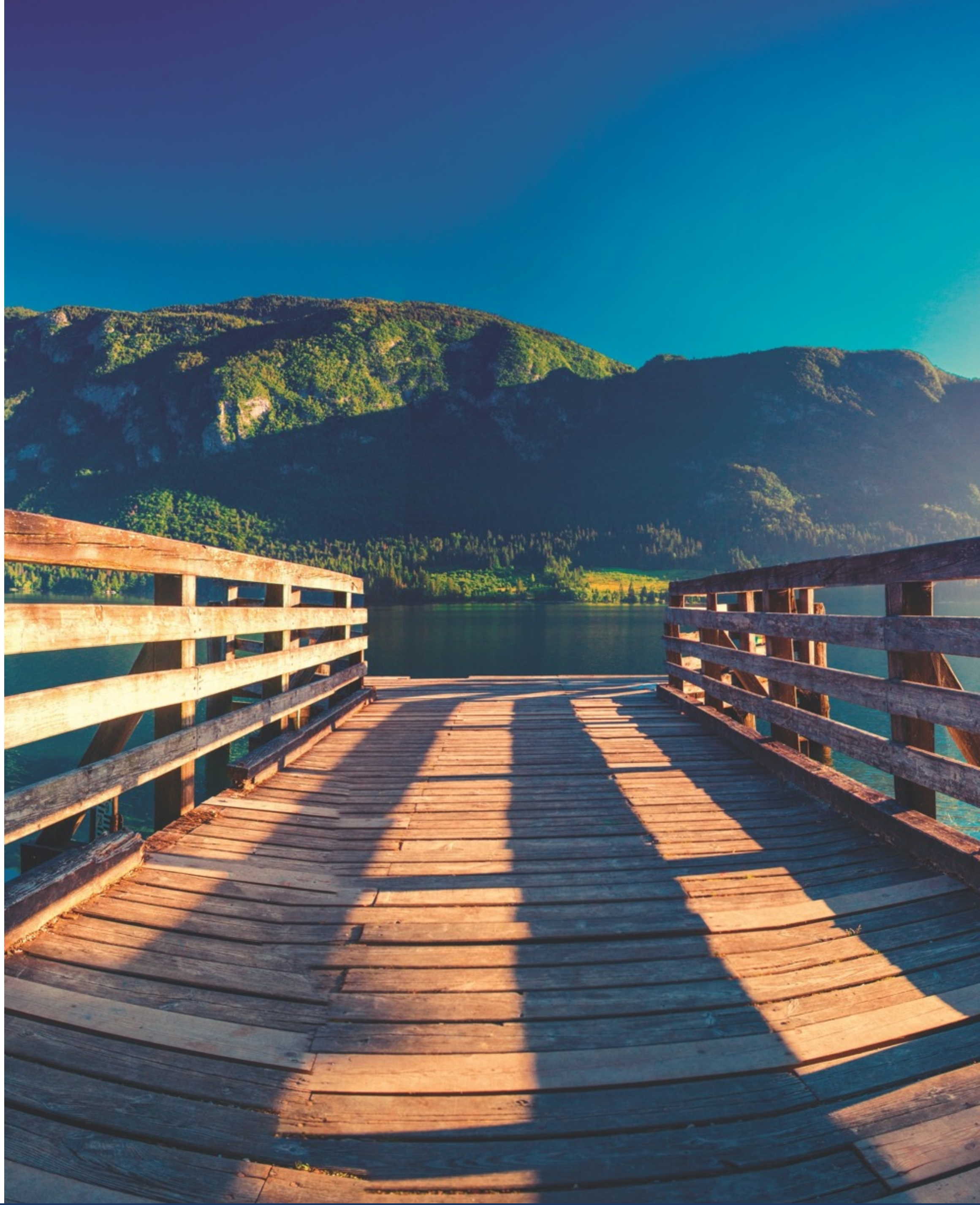
Financial Planning Team

Investment Adviser Representative with Eagle Strategies LLC

Nautilus members who are affiliated with Eagle Strategies provide fee-based financial planning, investment advisory services, and access to investment management programs—a full spectrum of personalized, professionally managed financial resources.

Eagle Strategies LLC

Eagle Strategies LLC is registered with the Securities and Exchange Commission as an "Investment Adviser" and is an indirect, wholly owned subsidiary of New York Life.



Investment Resources

Registered Representative of NYLIFE Securities LLC

NYLIFE Securities has the resources needed to provide you with world-class brokerage services and a wide variety of investment options, helping you maximize your opportunities to grow and maintain your wealth.

NEW YORK LIFE

NYLIFE SECURITIES

NYLIFE Securities LLC is a wholly owned subsidiary of New York Life Insurance Company, (Member FINRA/SIPC) A Licensed Insurance Agency.

We’re here for the long term.

We are committed to be here for you, through all the economic ups and downs that will surely come.

Change is inevitable, but we’ll be here to help you adjust and adapt your plan, to prepare you for all the rewards—and challenges—the future holds.

We can help you create peace of mind and legacy for your family.

To learn more about us,
visit CHallAndAssociates.com

THE NAUTILUS GROUP® | CARRIE HALL & ASSOCIATES
FINANCIAL AND INSURANCE SERVICES

Carrie L. Hall, CLU®, CFP®

Founder | Carrie Hall & Associates Financial and Insurance Services

Carrie founded the firm in 1988 to work with affluent individuals, business owners, boards, and executive groups in the areas of business planning, estate strategies, wealth management, and executive benefits. The firm works closely with clients and their advisors to provide enhanced designs and high levels of service and support in these areas. Carrie is a member of Nautilus Plus and the Advanced Service Model Group for Eagle Strategies LLC.

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