



COOL HOLLOW FINANCIAL

AT **COOL HOLLOW** FINANCIAL, OUR MISSION IS TO INSPIRE OUR CLIENTS TO MAKE THE RIGHT DECISIONS FINANCIALLY FOR THE ENRICHMENT OF THEIR FAMILIES, THEIR BUSINESSES AND THEIR COMMUNITIES.

WE **BELIEVE** IN:

S **tewardship** - the careful management of something entrusted to one's care;
ervice - valuable action performed to satisfy a need or fill a demand;
ynergy - the increased effectiveness that results when people or entities work together;
uccess - achieving the desired result!



**WE OFFER A COMPREHENSIVE, HOLISTIC
APPROACH TO HELP YOU NAVIGATE
YOUR ENTIRE FINANCIAL LIFE.**

WE PROVIDE

INDIVIDUALS AND FAMILIES

Personal Financial Planning

- Life, disability income and long term care insurance
- Investments and asset management
- Tax management
- College funding strategies

Retirement Planning

- Individual Retirement Accounts (IRA)
- IRA rollovers
- Annuities

Estate Planning

- Estate tax minimization strategies
- Wealth transfer strategies
- Charitable giving techniques

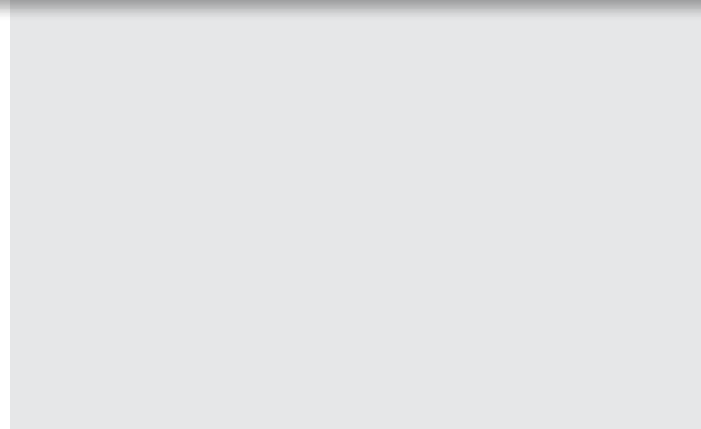
BUSINESSES OWNERS

Business Protection Planning

- Business valuation
- Buy-sell funding options
- Key person insurance
- Employee and executive benefits

Business Succession Planning

- Exit strategies
- Estate equalization



Meet our team of Financial Professionals:

Mark Richards, John Schriever, Jonathan Bard, Alyssa Proctor, Ben Schriever



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COOL HOLLOW
FINANCIAL

417B Phoenix Drive

Chambersburg, PA 17201

Office: 717-496-4093

Email: markrichards@financialguide.com

Securities, investment advisory and financial planning services offered through registered representatives of MML Investors Services, LLC, Member SIPC
5001 Louise Drive, Suite 300, Mechanicsburg, PA 17055 717-791-3300.

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