PICKENS HOLLOW
FINANCIAL GROUP, LLC

Prepare for a Meaningful Life

Providing Tailored Financial Planning For Over 25 Years

Our Advisors

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Our Values

We believe the values you learn when you are young shape and mold who you are, and we're proud to carry the authenticity of small-town living with us wherever we go. To us, Pickens Hollow means being clear about your intentions, direct with your words, genuine, and honest in your communication. We're committed to our clients and putting their needs first and we are always focused on your best interest.

Our Capabilities

We provide client-centric planning, focused on our clients' goals, objectives, desires, and dreams. In our 25th year in business, we continue to strive to bring small-town values to big-city challenges. Our firm helps business owners, driven professionals, and retirees cultivate success by merging small-town values with proven financial principles.

Personal Planning For Individuals And Families:

- Financial Planning
- Retirement Planning
- Investment Management
- Life Insurance
- Fixed, Variable, and Immediate Annuities
- Mutual Funds
- Long Term Care Insurance
- Disability Income Insurance

Business Planning:

- Business Succession Strategies
- Buy-Sell Funding
- Deferred Compensation
- Key Person Protection
- Qualified Plan Funding (401k, SEP, Simple IRA's)

Our Process

We don't believe in cookie-cutter services or a one-size-fits-all approach. Instead, we follow a meticulous process designed to know each client's situation, goals, and risk tolerance so we can make appropriate recommendations. Everyone is different and we may amend our approach to suit a specific client, but in general, we utilize the following process to help those we're privileged to serve.