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Hillis Financial Services Hosts Event on Aging and its Financial Implications

Local advisors help community understand the economics of getting older

San Jose, Calif. — February 3, 2016 — Hillis Financial Services, a San Jose-based independent wealth management firm, recently hosted a well-attended seminar discussing the financial impacts of aging at the Golf Club at Boulder Ridge in San Jose on January 20, for clients and guests. The seminar, "Aging and its Financial Implications," featured guest speaker Kathleen Pritchard, Chartered Retirement Planning Counselor (CRPC) and Chartered Financial Consultant (ChFC®) and had approximately 90 attendees. The event was hosted by the firm's President, John Hillis, executive vice president, Caroline Delany, and senior vice president, Henry Goldstone.

Pritchard has more than 28 years of experience in the financial services industry and is a dynamic, engaging and passionate speaker and coach for her clients. Pritchard's discussion was aimed to help aging individuals plan ahead and maintain control and dignity as they age. Key topics included understanding realities and dispelling common myths about aging and finances, assessing retirement housing needs, retirement housing options and how healthcare can affect a financial plan.

"We were thrilled to have Kathleen speak on such a critical topic that not many individuals are physically nor financially prepared for," said Hillis. "We wanted to ensure that our clients were appropriately armed with the information needed to make life altering decisions as they get older."

Hillis Financial Services has been a trusted San Jose wealth management firm since 2001. Mr. Hillis has more than 40 years of experience providing financial planning and asset management advice to individuals, corporate executives and business owners.

About Hillis Financial Services

Hillis Financial Services is an independent, personal wealth planning firm focused on managing the "irreplaceable assets" of its clients, families and individuals, many of whom are small business owners. The firm uses a conservative approach to its proactive client portfolio management, believing that managing downside risk can be more important in today's economy than seeking upside growth. As independent representatives of LPL Financial, the financial professionals at Hillis Financial Services, primarily provide unbiased fee-based advice and services including personal financial, retirement, education, tax and estate planning; long-term care, charitable giving as well as risk management. The financial professionals build customized asset allocation portfolios of stocks, bonds and alternative investments for their clients. The team has more than 70 years collective experience in managing portfolios, and many clients have been with the firm's advisors for more than 30 years. The firm is based in San Jose, California. For more information, please visit www.hillisfinancial.com. The financial professionals at Hillis Financial Management are registered representatives with and securities and advisory services offered through LPL Financial, a registered investment advisor, Member FINRA/SIPC.

Kathleen Pritchard is not affiliated with Hillis Financial Services or LPL Financial