

# The Strategic Second Opinion Service

“A+ Client Experience” is our number one goal.

According to a 2016 *Wall Street Journal* article, *Wealthy Investors Stage Revolt Against Advisors*, investors have never been less happy with their financial advisors. 81 percent of investors with \$1 million or more in investible assets plan to take money away from their current advisor. An even larger number - 86% - plan to tell other investors to avoid their advisor. The most surprising finding is that poor performance is not the reason for investor discontent. Of those clients whose investment returns have beaten pre-determined benchmarks, half planned to take money away from their advisor. In other words, good numbers cant overcome bad service.

At Hyre Personal Wealth Advisors, providing an “A+ Client Experience” is our number one goal. We’re extremely proud of our qualifications:

- Highly educated and credentialed professional staff
- Comprehensive, holistic, and team-based approach
- True Wealth Experience
- Ongoing client education and communication
- Planning Based
- Defined and disciplined investment process



**Jim Hyre**  
CFP® and CAP®  
Registered Principal

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As a valued client or friend of HWP, our team is excited to provide you with our **Strategic Second Opinion Service** offering. This is available to the people you care most about — your friends, family members, and colleagues.

Any introductions you provide to us would receive the same value-added, no pressure, no obligation experience that *you* received when you were deciding whether or not to engage. They will receive our complimentary and customized **Wealth Management Analysis** which will provide them with a personalized summary regarding their financial situation, along with a transparent look inside the operations of our practice to determine whether we are a good fit for one another.

**Don’t mistakenly assume that those you care about the most are in good hands - introduce them to Hyre Personal Wealth Advisors**

## Consultative Process



### Analysis Meeting

Diagnostic of current situation which spells out proficiencies and deficiencies to determine if HWP can add significant add value.



HYRE PERSONAL WEALTH  
ADVISORS

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