

CAPABILITY OVERVIEW

A profound shift in how we view life.

How do you view your life as it unfolds each day? Perhaps, you see the need for more work/life balance. Greater financial independence. Or an enduring legacy for your family.

For three decades, affluent individuals, companies, and business owners have relied on **The Henehan Company** to design, implement and manage the ideal shield to protect themselves, their families, businesses—and control costs.

Your Well-being

We've produced meaningful results in the entertainment, manufacturing, medical, and professional services industries. From custom insurance applications or cloud-based HR services

to sophisticated executive benefit plans, our five-point process and consultative approach deliver what clients need to keep pace with a changing economy, workforce, and lifestyle.

Care and Attention

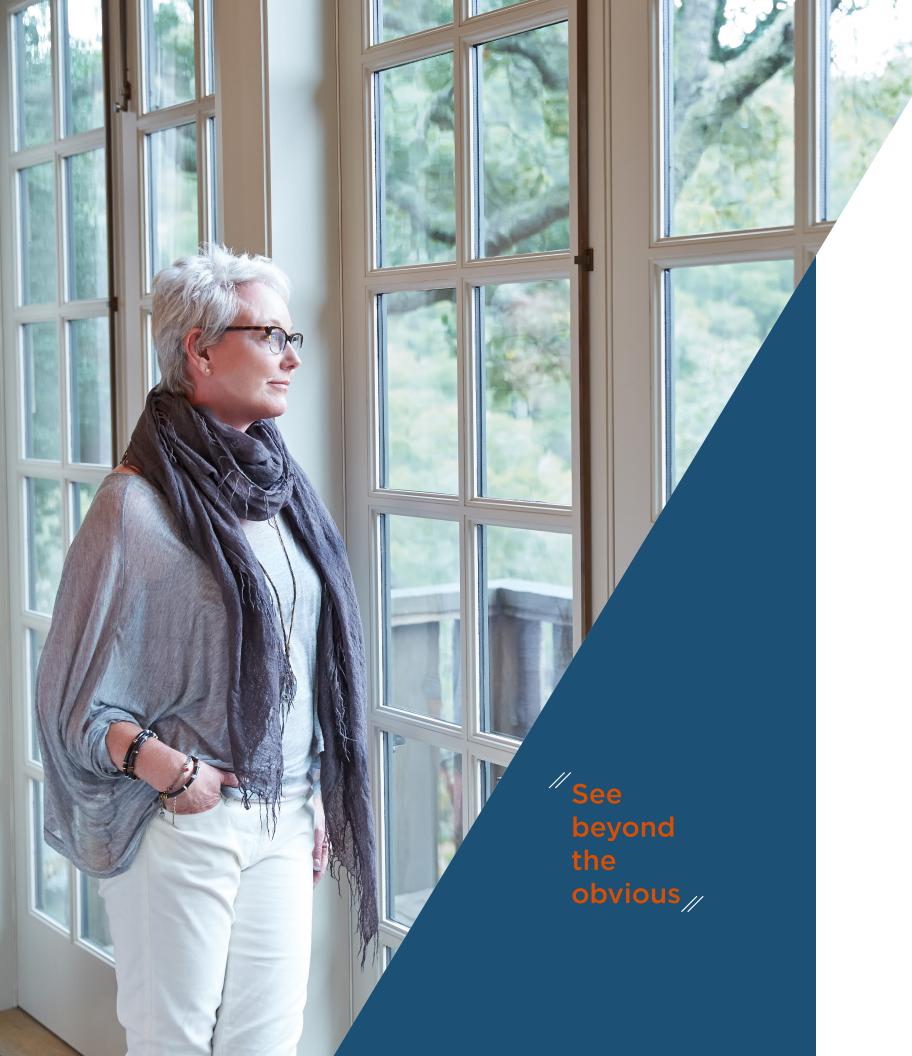
Founder, Joe Henehan, possesses the heart of an educator, sharing a deep understanding of protection strategies, provider practices, and product applications.

No matter your industry, the Henehan team will strategize, tailor, and track your financial profile with heartfelt care and personal attention.

Change Your View

Whether a millennial entrepreneur, seasoned corporate executive, or company owner, you need to know if you stand on firm ground in life. Use our financial know-how and long experience to your advantage. And let's share our views on life.





Can a clear path ensure success?



Constructing a sound financial framework requires more than expert advice. It requires the vision to see beyond the obvious. At Henehan, we invest quality time first to learn your beliefs and behavior. Because life offers us the continual opportunity to adapt and become resilient. That's why you want a financial advisor who cares about what's on your horizon.

Special Expertise

Henehan professionals advise and execute on a wide range of sensitive financial areas:

Executive Benefit and
Employee Retirement
Plans, Group Life and Health
Insurance, and individualized
life insurance strategies for
owners and executives. You

may want to better reward your employees, guarantee your family security, or simply bring down costs. And we know how to build that sound framework for you.

Facing Gaps?

Three out of four businesses are underinsured, especially on

the lives of owners and highly compensated employees.

If you need to clear your path to see the best direction, we're ready to guide you all the way to success.

Turn concern into confidence

Using a simplified yet powerful financial framework, our professionals follow the Henehan Horizon Process™, which confers three core advantages to clients:

- 1. the framework to assess diverse client needs under an overarching approach designed for positive outcomes
- 2. the ability to explore goals and needs at each life stage with the flexibility to adjust as events change
- 3. the foundation to measure client financial data and set in motion a personalized course of action

The Henehan Horizon Process enables us to zero in on your life view and tailor our solutions to enhance your perspective and values. Consider the impact of these external forces on your business, your family. Or on you.

Economic inflation
Tax regulations
Market volatility

Consequential life events
Litigation risks
Insurance protection gaps

Henehan professionals work diligently on your behalf to avoid the negative consequences of forces you cannot control. Once we know you well, we carefully analyze and measure the suitability of financial solutions in the universe of choices.

You benefit with actionable information to inform your decisions on what matters most—your sense of well-being. When you're bolstered by a clear and consolidated view of your total financial profile, your concern gives way to the confidence of

well-made financial decisions. Strategic. Timely. And as your life path unfolds.

With Henehan, you can look forward to greater financial control over your life's journey. Now and beyond.



Not all these objectives are possible in every client circumstance. Individual results may vary and are dependent upon a variety of economic and personal factors.

Process makes perfect.

A simplified, powerful financial framework, the Henehan Horizon Process™ confers three core advantages to clients:

- 1. Ability to structure diverse needs under one overarching approach built for action.
- 2. Offer a guided process to explore needs at each life stage with flexibility to adjust as events change.
- 3. Measure client financial data and prepare a course of action-for-results.

In close collaboration with our client, we work to resolve any negative potential of external forces, while setting in motion a discovery effort to uncover hidden opportunities for asset protection and growth.

What You Need to Know

Enjoy a clear and consolidated view of your total financial profile 24/7. Work with us as we measure and analyze the suitability of various financial products given your goals. Make financial decisions in a strategic and sequential (life path) manner. Protect, save, and grow wealth without added costs.

Now that everyone in your family has their needs cared for, your ready to experience greater financial control over your life's journey.

Now and beyond.

Discover Client Perceived Needs Analyze Issues Against Best Practices Educate & Collaborate to Explore Determine Solution(s) in Client's Best interest

Implement & Communicate to Participants

View your life clearly.

Our business depends on client trust. Let us earn yours.

If you think we can help, even if you're not sure, but want to explore possibilities, know this: we'll do everything in our power to know you, your circumstances, and all that you value.

It's all about protecting you, your vision, and your sense of well-being. At work or in life.

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