



Protecting
Your Well-Being
at Work.
And in Life

Henehan

health | wealth | life

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.

// Life urges us
to create
meaning and
purpose
by helping
others //





// See
beyond
the
obvious //

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.

// There's
nothing
better than
feeling
confident
about my
future //



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.

CORPORATE OFFICE

Joseph E Henehan Financial and
Insurance Services Inc. DBA The
Henehan Company
Ca License #: 0691096

685 East Carnegie Drive Suite 205
San Bernardino, CA 92408

info@henehan.com
Office: 800.909.7040
FAX: 909-383-7047
henehan.com



health | wealth | life

Employee Retirement Plans | Executive Benefit Plans | Group Health/Life Insurance