



Contact Information

Judy Haselton
 Harmony Financial Advisors
 Suite 26E
 60 East 8th Street
 New York, New York 10003
 212-677-6100
info@harmonyfinancial.com
www.harmonyfinancial.com

Personal Statement

Harmony Financial Advisors is a holistic financial planning and investment management firm providing highly personalized, unbiased advice to individuals and families. As a trusted financial advisor, the firm helps clients achieve their life goals by designing integrated financial strategies that maximize value and peace of mind. Harmony Financial specializes in transitioned planning during major life events such as marriage, divorce, loss of a loved one or career change.

Professional Services	Financial Planner Investment Manager
Practice Approach	Comprehensive Financial Planning Portfolio Management Client Focused
Client Focus	Individuals, couples, families
Typical Client Profile	Age: 40-70 Gender: men and women Income: \$100,000 and up Net Worth: \$500,000 and up
Licenses/Certifications/Designations	CFP Registered Life Planner, Sudden Money Advisor
Education	MBA, Columbia University CFP Certificate Program, New York University
Fee Structure	Fee for assets under management Hourly for financial planning
Years in Practice	5
Professional Association Affiliations	Sudden Money Institute Kinder Institute of Life Planning Natl. Assn. of Pers. Fin. Advisors (NAPFA) Financial Planning Association Financial Therapy Association
Research Interests	Providing coordinated financial planning client services