

## **MPH Asset Management Co. Fact Sheet**

### **Overview**

Michael P. Hanley, Inc. was founded October 1968 and (MPH Asset Management Co.) a Registered Investment Advisory firm – Member FINRA and SIPC; CRD #235862 was created September 1992. MPH provides substantial experience that yields sage financial solutions through three different, but related, areas of the company: Asset Management & Life Insurance at 50+.

MPH Asset Management Co. focuses on the business of designing, implementing and managing client investment portfolios. Securities offered through KMS Financial Services, Inc. member FINRA and SIPC. We are currently licensed in Alaska, CA, CT, DE, ID, MI, & VA. Michael P. Hanley, Inc. is also life, annuity and disability insurance licensed – California Corporate Insurance license #0683322 – and sells these products when necessary to complete client objectives.

In keeping with best practices in the investment supervisory industry, MPH is a fee-based advisor, allowing the firm to concentrate on analyzing each account to determine the most effective long term arrangement for each client.

### **Services**

MPH provides services for a varied client mix, among them: individuals (includes trusts, estates, 401(k) plans and IRAs of individuals and their family members), high-net worth individuals, pension and profit-sharing plans, corporate and other businesses.

With the aim of offering the most effective advisory services to both clients and potential clients alike, every solution and company recommended is reviewed for financial integrity and suitability before being presented to the client. References are gladly given upon request.

Asset management services are based on understanding a client's goals, time frames, risk profile and liquidity needs. In addition a comprehensive audit for life insurance at 50+ is also offered, and looks closely at all variables that may affect a client's situation to ensure the policy remains competitive. With improved lower mortality rates, it is not unusual to implement a new permanent plan at a lower cost even though client is older, but only if in good health.

### **Affiliations**

MPH maintains affiliations with many different financial services companies plus life, annuity and disability insurance companies in order to avoid particular incentives that favor one company, or one company's products, over another – which leaves our advisory team free, at all times, to locate the products best matching the client's objectives.

Michael Hanley is licensed with KMS Financial Services, Inc. and he and his staff access and consult on a regular basis with their due diligence staff which reviews mutual funds, variable annuities, and other package products. KMS currently has \$39 billion in assets under management. MPH uses S&P Market Advisors, Bloomberg, Thomsen and Morningstar to research all investments prior to implementation with copies to the client.

### **Headquarters**

MPH Asset Management Co., a service of Michael P. Hanley, Inc. (a California Corporation), serves all of the San Francisco Bay Area and many other states mentioned above from its headquarters in Walnut Creek, California.

## Contact Information

For media queries and more in-depth information on MPH Asset Management Co. and Michael P. Hanley, Inc., please contact: [Maria Gonzalez](mailto:GeezerAdvice@mphanley.com), GeezerAdvice®, direct line: 510.295.4114. For more information on services offered, please visit: <http://mphanley.com/>.