



HoyleCohen Launches New Women's Wealth Practice

- ***“Wealth by Design for Women” fills void in advice for women***
- ***Veteran adviser hired to co-lead Group***

July 26, 2011 - [HoyleCohen, LLC](#), a leading independent wealth management firm, has announced a revolutionary new practice, [Wealth by Design for WomenSM](#). Led by Elisabeth Cullington and Janet Acheatel, Certified Financial Planners, the new practice changes the way financial advice is provided to high-net-worth women, especially newly independent women and business owners between the ages of 45 and 75.

Wealth by Design for WomenSM takes clients through a comprehensive wealth management process that first seeks to understand each client's attitude about money and their priorities. Ongoing opportunities to learn about personal finance and next generation preparation are included in the firm's service model to build financial literacy and confidence. The practice focuses both on women in transition, such as recent divorcees and widows, as well as entrepreneurial and professional women who are taking a fresh look at aligning their wealth with their personal goals and values. The program emphasizes on-going contact with clients to ensure that their needs are being met as their circumstances change.

Additionally, HoyleCohen hired Janet Acheatel who brings 30 years of experience in investment advisory to the firm's *Wealth by Design for WomenSM* practice. Prior to joining the firm, she served in a variety of senior positions at Brandes Investment Partners, Nicholas Applegate Capital Management and Lexington Capital Management.

“Women's societal influence and wealth are on a one way track leading upwards. Studies have shown that in the next decade, women will control two thirds of consumer wealth. Despite this, the market has been slow to give them the support and services they need to manage their wealth and life goals,” said Mark Delfino, managing director, HoyleCohen. “*Wealth by Design for WomenSM* is our firm's way of showing our support to women and meeting a real need in our industry.”

Elisabeth Cullington added, “Our experience has shown that female clients are increasingly dissatisfied with the traditional approaches that ignore their specific goals. In contrast, our practice group provides a more collaborative and information-rich environment to help women leverage their financial independence towards their own priorities.”



As part of the comprehensive offering, *Wealth by Design for Women*SM will collaborate with a client's other trusted advisors, including attorneys, real estate professionals, insurance agents, CPAs and bankers. This approach enables a truly holistic service and offers clients greater financial confidence.

Said Janet Acheatel, "I am very pleased to be joining this exciting new practice dedicated to women. Industry experts are increasingly supporting what we already know from experience: that women need more from their providers."

This year's TD Ameritrade National Conference highlighted the importance of women and finance. "Our conference underscored the growing importance women with wealth play in our society," said Tom Bradley, president, TD Ameritrade Institutional. "We are committed to supporting independent advisors who want to serve women better and are pleased to see progressive firms like HoyleCohen creating an entire business unit to do this."

About HoyleCohen

Founded in 2001, San Diego, CA-based HoyleCohen, LLC offers independent, comprehensive wealth management and estate planning services, including: retirement planning, investment management and legacy planning. Joseph Cohen, Kevin Hoyle and Mark Delfino are the Managing Partners and have over 30 years experience in the financial services industry. In 2006, HoyleCohen, LLC joined Focus Financial Partners, LLC, the leading international partnership of independent wealth management. For more information about HoyleCohen and *Wealth by Design for Women*SM, please visit www.hoylecohen.com and www.wbd4women.com.