BluHawk
WEALTH MANAGEMENT
bluhawkwealth.com

What Sets Us Apart

A Clear, Client-Centered Mission

- We serve as true facilitators who seek long-term wealth growth, focusing on strategies that are both cost-efficient and risk-aware.
- Our investment approach is time-tested, thoughtfully designed, and managed in-house, with competitive fees.
- We prioritize transparency, fairness, and decisions that always place our clients' best interests first.

A Collaborative Team Approach

- Every client benefits from the collective insight of our advisory team, not just a single perspective.
- We intentionally explore every opportunity to help clients seek to build, protect, and transfer wealth.
- Our focus extends beyond today, supporting meaningful legacy outcomes for generations to come.
- With a multi-advisor support model, clients experience continuity, stability, and a long-term team that will serve their family well into the future.

Comprehensive, Value-Driven Planning

- Tailored investment management aligned with each client's unique goals and risk profile.
- Tax-efficient and tax-sensitive strategies that seek to to preserve and enhance wealth.
- Integrated financial planning, including:
  - Proactive tax review and planning
  - Estate plan review and development
  - Forward-looking legacy strategies

Proactive Communication & High-Touch Service

- Clients hear from us during key market events, major planning opportunities, and relevant tax moments throughout the year.
- Our team removes complexity wherever possible, ensuring a simple, clear, and confident client experience.

In-House Investment Research & Portfolio Construction

- All portfolios are designed, monitored, and managed internally - creating transparency, consistency, and the ability to adapt quickly.
- We utilize disciplined risk tools, valuation work, and economic research to make informed, forward-looking allocation decisions.
- Proprietary investment sleeves allow us to provide access to multiple investment types (mutual funds, ETFs, stocks, bonds, etc.) under a unified account structure.
- By managing portfolios in-house, we also reduce reliance on third-party managers - seeking to keep investment expenses lower and allowing more of the client's return to stay with the client.

A Sustainable, Forward-Thinking Model

- We believe in fair value for clients that also supports reinvestment in our people, technology, and resources.
- This reinvestment seeks to fuel continuous improvement, innovation, and exceptional client experiences.
- Our commitment is to build a durable, evolving firm and brand that thrives for decades to come.

Transparency

- Straightforward, competitive, and fully disclosed fee structures - no hidden incentives or product commissions.
- Clients understand the “why” behind every recommendation.
- We prioritize education, clarity, and informed decision-making at every step.

The BHWM Promise

- Professional. Thoughtful. Relentless in pursuing better outcomes.
- A modern wealth management firm rooted in integrity, stewardship, and long-term partnership.
- Always improving, always adapting, with our clients’ success at the heart of everything we do.

Don’t just take our word for it.

See what our clients have to say.

We highly recommend Greg Bennett and the team at BluHawk Wealth Management...

— TW & AW, President of Mid-Sized Enterprise · 4/2/2025

Greg separates himself from the pack by combining technical expertise with a personalized, client-focused approach that fosters trust and long-term relationships...

— Jim & Barb C., Retired Business Owners · 12/3/2024

Through our family joys as well as in times of grief, we have never, not once, doubted that he had our best interest at heart. And that is rare and precious...

— Ellen S. & Kathryn T., Educators · 8/8/2024

Greg Bennett has created a highly organized and integrated group which is exceptionally accessible and accountable for our portfolio... We cannot imagine a better team...

— Peter & Susan B., Retired Physicians · 8/2/2024

Working with Greg Bennett has truly been a transformative experience for us. What sets Greg and Austin apart is their ability to meet us where we are, both financially and emotionally...

— Mark & Tony H., Retired · 3/13/2025

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