

Making Your Financial
DREAMS COME TRUE™


COWDELL™
INVESTMENTS, LLC



OUR SERVICES & PRODUCTS

WHAT WE DO

We are frequently asked, “What do you do”? This brief brochure will describe some of the products and services that we provide.

We specialize in retirement planning and offer all types of financial products at Cowdell Investments.

We have been helping people successfully retire for decades by using our proven time tested strategies. Many of our clients have been able to retire early, travel, start companies, serve others, and spend more time with family and friends.

We offer professionally managed investment portfolios for our clients. We offer stocks, bonds, mutual funds, ETFs...just about anything that you might need to create a successful investment portfolio. Our fees are much lower than the competition and this means more money for you.

RETIRE EARLY,
TRAVEL, START
COMPANIES, SERVE
OTHERS, & SPEND
MORE TIME WITH
FAMILY & FRIENDS



INSURANCE PRODUCTS

We have access to all types of annuities that provide income guaranteed to last a lifetime. This can provide you with peace of mind knowing that no matter how long you live you will never run out of money.

We offer accounts that go up when the markets go up but do not go down when the markets crash. These accounts are ideal for those who want little to no risk for their retirement nest egg.

We offer all types of insurance products. This includes Auto, Home, Life, Health, Disability, Medicare Supplement, Business, Liability, etc. Just about any type of insurance that you might need. This is through our licensed independent agents who shop the nation for the best prices so you save money. Recently we shopped a man's auto policies, got him better coverage, and saved him over \$1,000 per year. What would you do with an extra \$1,000?



AUTO,
HOME,
LIFE,
HEALTH,
DISABILITY,
MEDICARE
SUPPLEMENT,
BUSINESS,
LIABILITY,
AND MORE.

WEALTH MANAGEMENT

Our wealth managed accounts offer some of the best return potential in the nation. Check out our live returns online at www.RetireRichToday.com

Working with our team will make the whole process easier, saving you time and money.

We have in-house Certified Financial Planner professionals who have decades of real-world experience helping people achieve their financial goals. The CFPs are available to you at no additional cost.

We are here for you! We offer a free risk analysis of your investments, giving you greater insight into your financial future, even those not with our company!

We can also provide you with a financial roadmap or financial plan to help you achieve your goals. We will help you get out debt, accumulate wealth, preserve that wealth, and pass it on to your heirs. We do complete financial planning.



PROVEN,
TIME-TESTED
STRATEGIES

BOTTOM LINE

We have been helping people make their financial dreams a reality for decades and we look forward to helping you
**Make Your Financial
Dreams Come True™**



CONTACT US!



COWDELLTM
INVESTMENTS, LLC

COWDELL INVESTMENTS, LLC

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