

## INDIANA

## Financial Leaders

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# For Financial Planning and Implementation, a 'One-Stop Shop'

*Creative Financial Designs*

Maybe you're an individual wondering, "Am I planning well for my financial future?" Or maybe you're a financial adviser asking yourself, "Am I serving my clients at the very highest level?"

"If you're working with Creative Financial Designs or its sibling company cfd Investments®, the answer in both cases is 'Yes,'" says Brent A. Owens, president. "As our business's motto says, 'You gotta have a plan,' and we help you create it and put it to work."

*"New clients and new advisers often tell us, 'I wish I'd known about you 20 years ago.'"*

— Brent Owens

Both firms are members of a family of companies that provide one-stop shopping – serving nearly every financial interest an individual might have, from investing to banking, estate planning to insurance, accounting to real estate. Creative Financial Designs is an RIA in all 50 states. The company, which opened in 1982, has 175 advisers. cfd Investments®, founded in 1990, is a broker/dealer that puts the needs of clients ahead of those of the company. "We believe that you need to put the 'mission' before the 'commission.' We strive to exhibit integrity and commitment," Brent Owens says. "And we bring in advisers



Mick Owens, CFP®, ChFC®, CLU®, founder of the CFD Companies



Left to right: Kris Hale, vice president of cfd Investments; Brent Owens, president of cfd Investments and Creative Financial Designs; Bill Cardwell, head of financial planning; Kregg Rooze, vice president of Creative Financial Designs

## MISSION DRIVEN:

"The 'cfd' companies are financial organizations dedicated to providing Financial Advisers with the necessary support, tools, techniques, quality financial products, and technologies for the achievement of their clients' goals and objectives through a team of home office personnel committed to serving advisers in a Christ-like manner, believing you cannot push someone to the top of the mountain without getting there yourself."

who live and work by those standards, allowing them the flexibility and independence to serve clients holistically, in all financial areas and in the ways they consider best. Those are the kinds of professionals we welcome here."

The companies are the brainchild of Mick L. Owens, CFP®, ChFC®, CLU® – an adviser with more than four decades of experience, and Brent's father – who believes clients should have access to fee-based financial planning services where they won't feel they have to buy whatever proprietary product the firm is selling.

"People go through life and they just react," says Brent Owens. "We want people to be intentional about planning

their future. We want to know what their goals and priorities are. We want to know when they want to achieve them, and how they want to achieve them. And then our job is to help put the plan together to help their dreams become a living reality."

Home base for the Creative Financial companies is Creative Financial Centre® in Kokomo, Indiana. "We have a great group of professionals who work here with us – more than 40 people who are excellent at what they do," Brent Owens says. "We're one of the best-kept secrets in the country. New clients and new advisers often tell us, 'I wish I'd known about you 20 years ago.'"



**Creative Financial Centre®**  
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