

# Experience the CFD Difference

OTHERS OPERATE IN CLICHÉ;  
WE OPERATE IN COMMITMENT.



**CFD COMPANIES**  
GROW WITH US

**NOT FOR  
CLIENT USE**

# About the CFD Companies:

Throughout our 40-year history, the CFD companies (Broker/Dealer and RIA) have consistently recognized that individuals are best served by a financial professional who possesses the freedom to implement personalized planning and investment strategies. We firmly believe that an adviser's Broker/Dealer and RIA should act as a partner and resource network, empowering adviser-client relationships through trust, innovative support and a shared commitment to mutual growth.

As you strive to meet the unique challenges of each client in an ever-changing world, we ask you to consider what it would mean to have the support of a firm that seeks to exemplify the belief that everyone deserves to be treated in a Christ-like manner. CFD is not seeking those who fit with what we have; we are seeking those who challenge us to spread grace and love through biblical stewardship and investing.



**CFD INVESTMENTS,  
INC. IS OUR BROKER/  
DEALER**

**CREATIVE FINANCIAL  
DESIGNS, INC. IS  
OUR REGISTERED  
INVESTMENT  
ADVISER**

# Why CFD



## **OUR BELIEFS**

Our Broker/Dealer and RIA embody uncompromising independence, while delivering exceptional service, ground-breaking innovation and ever-expanding support. It is through the execution of our mission that we demonstrate our foundational belief: everyone, regardless of their personal faith, deserves to be treated in a manner that embodies the love of Christ.



## **DRIVEN BY ADVISERS**

We challenge you to bring us new ideas and disrupt the status quo. It's not about how you fit with us; it's about how we can serve you.



## **UNCOMMON AGILITY**

Your business will change as your clients change; you expect more than a rigid partner. Our desire is to grow with you, so we will remain agile, constantly pursuing innovation and improved support.

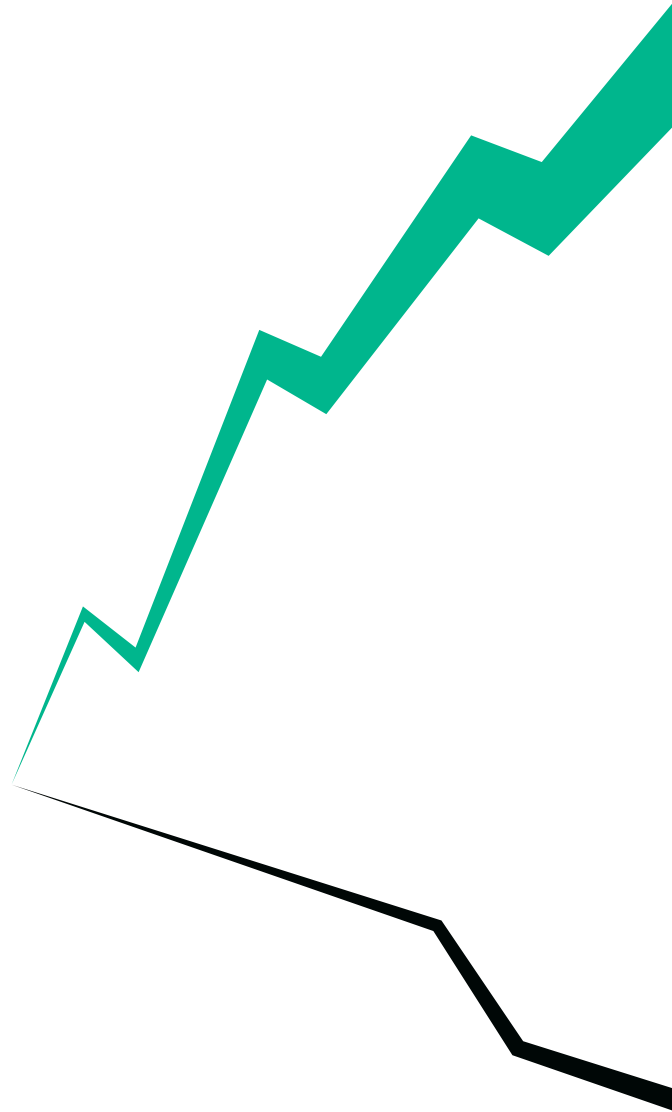
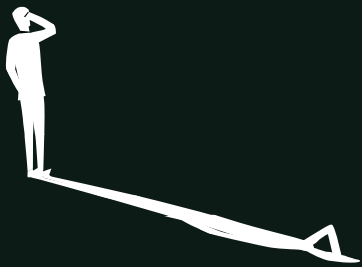


## **EMPOWERMENT THROUGH SUPPORT**

You know the needs of your business and clients better than anyone else. We empower you to meet those needs with a 3:1 adviser to home office staff ratio, ongoing staff training and open access to firm leadership.

# Next Stop, Home

Growing should be something to which we look forward. We want you to be excited about becoming a part of the CFD family, and we will work with you to create a plan to make your transition as seamless as possible. With the help of an assigned Onboarding Ambassador, we will make certain that the virtual assistant team and our various departments are all ready to jump in and help your business get set up to thrive in partnership with CFD.





## **THE COMMITMENTS**

Responsive to the unique needs of your business through service, industry partnerships and a personal relationship between you, your staff and the entire home office.

Receptive to the ever-changing landscape of the industry conveyed in a willingness to evaluate every request and proactively seek resolutions that empower the growth and prosperity of your business.

Vigilant in the pursuit of adopting new practices and technologies to improve the experience of you and your clients.

## **THE HIGHLIGHTS**

Established Broker/Dealer with existing selling agreements in place for major product providers/issuers

Established Registered Investment Adviser supporting multiple adviser business models

Available in-house financial planning

Available in-house, CFA-driven money management

Clearing/custody options

Transparent and published pay and fee schedules

Experienced, home office-based virtual assistant team

Direct communication with firm leadership upon request

Off-shore support only for our annual Presidential Advisers Trip

# Your Transition Blueprint

1

## A PERSONALIZED TRANSITION BLUEPRINT

Our Business Development team will coordinate with you and our various departments to create a personalized transition blueprint for your business.

2

## YOUR BUSINESS PRIORITIES FIRST

The home office team will work with you and your team to review the transition blueprint and make certain you decide on the prioritization within the process for optimal results.

3

## PLANNING & STAFF MEETINGS

Our home office team will meet virtually with you and your staff as many times as necessary to ensure that everyone is coordinated and prepared for your business's transition. In addition, we will pay to fly out your assistant for in-person training at our home office.



#### **VIRTUAL ASSISTANT TEAM**

An experienced team of virtual assistants working at our home office will be ready to manage much of the heavy lifting during this transition as most financial professionals will receive complementary VA hours in their transition package.



#### **FORM CUSTOMIZATION**

Recognizing the diverse needs of our clients, we may be able to customize certain forms to better align with your specific requirements and data. This flexibility allows us to provide more personalized services that directly cater to your unique operational challenges and goals.



#### **DATA MIGRATION**

Our IT, Processing, and Virtual Assistant teams will work with you to migrate over any data you have in a manner that will not violate client confidentiality nor expose you to regulatory scrutiny.



#### **BUSINESS PROCESS TRAINING**

Initial business process training for your various streams of business is a given, but we will continue to provide training upon request, as long as you are a part of the CFD family.



Throughout our 40-year history, the CFD Companies (Broker/Dealer and RIA) have consistently recognized that individuals are best served by a financial professional who possesses the freedom to implement personalized planning and investment strategies. We firmly believe that an adviser's Broker/Dealer and RIA should act as a partner and resource network, empowering adviser-client relationships through trust, innovative support and a shared commitment to mutual growth.



**[Joincfd.com](http://Joincfd.com)**