



CFD COMPANIES AT-A-GLANCE

Where Financial Advisers Find the Freedom to Thrive

About the CFD Companies

For more than 40 years, CFD Companies has served independent advisers with the freedom and flexibility to build practices their way. Through our Broker/Dealer, Registered Investment Adviser, and Turnkey Asset Management Program, we provide the platforms and resources advisers need to deliver trusted advice, pursue growth, and meet the diverse goals of their clients.

Our Mission

We are dedicated to empowering Financial Advisers by providing comprehensive support, advanced tools, proven strategies, high-quality financial products, and innovative technologies essential for achieving their clients' financial goals. Guided by a team of home office professionals, we are committed to serving advisers with compassion and excellence.



Registered Investment Adviser

Creative Financial Designs, Inc. is an SEC-registered RIA empowering financial advisers across the U.S. with concierge-level planning and investment management support—so they can devote more time to growing their practices.



Broker/Dealer

cfd Investments, Inc. is a top-ranked independent broker-dealer providing U.S. advisors nationwide with comprehensive investment solutions, home office support, and advisor recognition programs that foster growth and independence.



TAMP Services

Creative Portfolio Management (CPM) offers turnkey investment management services for advisers nationwide—outsourced portfolio construction, discretionary management, marketing items and performance reporting—so advisers can focus on growing their practices with efficiency and support.

40+

Years in Business

\$7+

Billion in Assets Served

#35

Independent Broker/Dealer
in the Nation

21+

Managed Investment
Strategies Offered In-House

1

Home Office Support Person
per 3 Financial Advisers