

NOT FOR
CLIENT USE

 CFD COMPANIES | 

Creative Financial Designs

Registered Investment Adviser

A Journey to Excellence

As investment strategies continually evolve, the CFD Companies remain committed to the progress of intentional, values-driven investing. Our Biblically Responsible Investing approach is not just about financial growth; it's about nurturing investments that positively impact the world and align with our moral compass. Our talented money management team, including two CFAs, identifies and employs investment strategies that strive to avoid participation in, or profit from, activities that contribute to the suffering or marginalization of others.

This philosophy of aligning investments with integrity reflects our 40-year commitment to empowering financial professionals and their clients. At CFD, investing is more than a transaction; it's a journey towards mutual growth, underpinned by partnership, autonomy, and moral responsibility. Our approach resonates with the ethos of 'Your goals, our commitment,' ensuring that the measure of investment success is inclusive of both profit and principles.

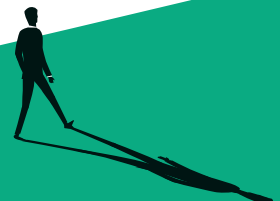
Our Mission

We believe the next step in the evolution of biblically responsible investing requires more than acceptance. We believe the next level of growth will require firms and advisers who share a passion for principled investing to come together in partnership. What would it mean to your business and clients to partner with a firm that doesn't just allow BRI, but believes in it as a mission to demonstrate the love and hope of Jesus? We encourage you to visit Joincfd.com and explore the possibilities of partnering with a firm committed to grow with you in both faith and business.



Scan the QR code to instantly access more information and begin your journey with CFD.

Joincfd.com



It's Your Turn to Define Independence

As you navigate the changing landscape of financial services, consider aligning with an RIA that understands and values your entrepreneurial spirit and does not define independence for you. Whether you are seeking a turn-key solution to manage your client assets, or are pursuing a more hands-off partner, Creative Financial Designs can tailor our services to meet the needs of your business. The personal experience you and your clients receive is our highest priority. Our desire is to foster a meaningful partnership that empowers you and your clients through a legacy of trust, support and innovation. Join us in our mission to serve with integrity and commitment.

The Details

In-house money management available, including BRI strategies


Flat payout of 90% when using third-party asset managers or adviser-directed management

Up to 100% payout when using Creative Financial Designs in-house money management team

Custody with Charles Schwab OR National Financial Services (NFS only available if dual registered with B/D)

Paperless environment with our Straight Through Processing (STP)

Account openings within 24 hours





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.



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