



Financial Planners

As a financial planner, there are often many issues that you face on a regular basis. Following is a list of typical situations you may be experiencing along with an explanation of how Coughlin Associates can offer assistance.

- **Situation:** Your clients have individually invested stocks, and they need you to follow them.
 - Coughlin Associates will pick up coverage of all of your current portfolio holdings and make timely and appropriate recommendations on them for you. CA will also do all your required research documentation, and keep you and your staff up-to-date on everything going on in your investment portfolios
- **Situation:** Your in-house analyst isn't making very good recommendations.
 - Coughlin Associates can provide you with the expertise of an experienced, senior investment professional, for the cost of a good administrative assistant
- **Situation:** Your clients are paying high fees for their wrap and mutual fund portfolios. This may be worth it in specialty areas, but for the core of their portfolio it seems unreasonable.
 - How many of your competitors will have the past head of investments for NationsBank's Private Client Group on their staff? Bring in Coughlin Associates to help you manage the core portfolios for your clients, and you can reduce their fees and possibly even enhance their returns
- **Situation:** You want to start aggressively marketing to High Net Worth investors, and a package of good mutual funds won't get you in the door.
 - Sophisticated, wealthy investors can have their pick of money managers around the country. Coughlin Associates can help you establish an individually invested portfolio product, with the quality, discipline and sophistication they expect in a money manager

Coughlin Associates

1255 Lake Plaza Drive
Suite 108
Colorado Springs, CO 80906

P: 719.471.7791
F: 719.471.7302
www.coughlin-assoc.com



- **Situation:** You know the high fees from the best wrap account managers take a significant cut of your clients' portfolios, and you are worried that after fees they will end up with index-like returns.
 - With Coughlin Associates as a member of your investment team, you can manage individually invested portfolios in house at a surprisingly low cost, allowing you to lower your client fees while expanding your fees
- **Situation:** The mutual fund portfolios you put together for your clients don't give you enough flexibility in customization to meet their particular needs.
 - Individually invested portfolios with Coughlin Associates providing all of your research needs can allow you to "fine-tune" portfolios for your clients, enhancing your ability to help them meet their financial goals
- **Situation:** You think investment returns are going to be fairly low over the next few years, but the fees for wrap managers or mutual funds are going to take a high percentage of those returns.
 - Investment research from Coughlin Associates is a fixed cost to you, and permits you to return a higher percentage of investment returns to your clients

Coughlin Associates

1255 Lake Plaza Drive
Suite 108
Colorado Springs, CO 80906

P: 719.471.7791
F: 719.471.7302
www.coughlin-assoc.com