OUR PHILOSOPHY

ALIGN YOUR FINANCES WITH YOUR LIFE

WHAT ARE YOUR GOALS

ANSWERING THE WHY

Our approach is to get to know each person. What are your goals? What are your fears? Then we help you answer the "why" question. If you know "why" we are developing your financial plan together and "why" we are making investments to help achieve your objectives, then you can handle anything that is happening in the market with peace. We build plans based on those goals that focus on maximizing returns while minimizing risk. We review and adjust as we go along—at the very least annually.

UNDERSTANDING RISK

IS CRITICAL TO SUCCESS

We specialize in helping you understand risk and what risk means for you and your portfolio. To achieve this, we use a tool called "Riskalyze," a two-step system that starts with a "Risk Tolerance Questionnaire," a series of questions that measures your comfort level with risk and scores it as a number from 1 – 99. It then measures risk on every security in a portfolio, so we can make any adjustments needed to better align investments with the client's risk tolerance.

THE D3 SYSTEM™

DISCOVER. DESIGN. DEPLOY.

Focused on making the complex simple, TDC Financial helps you understand the financial planning process. Our team has developed and refined a process to help successful people and entrepreneurs put all the pieces of the financial puzzle together. It's a dynamic process that adapts and changes as their lives unfold and their needs evolve – we call it our D3 System.

D1 At our **DISCOVER** meetings, we get to know you, your goals and why they're important.

D2 We then **DESIGN** a plan designed to get you to your goals safely and on time.

D3 Once you approve the plan, we then **DEPLOY** all the steps needed to put things in motion.

"Do what you love, love what you do. Live below your means, avoid credit card debt, and save 10% of every paycheck. Life goes fast, so enjoy it!"

OUR FOCUS IS
ALWAYS ON YOU

You are intimately familiar with your financial objectives. We are steadfastly dedicated to helping you design strategies to help you reach those objectives. Together, we are robustly capable of meeting the challenges you face in making progress toward your life vision. As your partner, we offer customized solutions and objective advice, and our consultative approach is personalized to your goals.

- RETIREES
- PRE-RETIREES
- YOUNG PROFESSIONALS

Terry D. Cox AAMS®
Owner, Financial Advisor

With more than 13 years of experience in the financial services industry, Terry Cox advises and educates clients on a broad range of financial / investment planning strategies.

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INVESTING WITH CONFIDENCE