



by Sara Sobota

Creating Solid Financial Strategies For Local Grand Strand Businesses

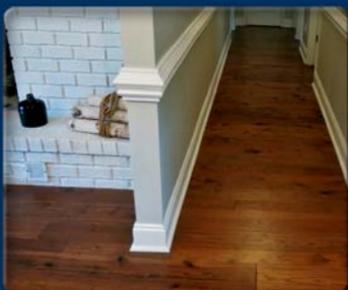
Cary Rowell knows how to create a plan that can help you meet your financial goals. Whether it's for a small business or an individual, he makes the client's financial goals his top priority.

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Cary Rowell, a licensed agent for New York Life Insurance Company, is a Wealth Advisor offering Financial Planning and Investment Advisory Services through Eagle Strategies LLC, a Registered Investment Advisor.

As financial advisor for Eagle Strategies LLC, a New York Life Company, Rowell begins every professional relationship by building a strategy with the client.

"When I meet with someone for the first time, we talk about what they're doing now, what works, what doesn't work, and what they'd like to do that they're not doing. I don't ever want to interfere with what's working now for somebody. I want to look for gaps or things that are not working well. I always start from the standpoint of strategic planning," Rowell said.

Clients often haven't considered their own goals, whether they might be growing income, building a legacy, or minimizing taxes. Each scenario demands a different approach, and his emphasis is on service before products.

"The focus of my work is not the products," Rowell said. "The products are a means to an end. Together, we determine what the end is, and then determine if you need any products to get there."

With 30 years of personal experience in the construction and building industry,



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Rowell is uniquely positioned to work with home builders, developers, contractors, and property managers.

"No one who does what I do understands what they do as well as I do," said Rowell. "I know how their cash flow works; I understand why they might have 15 different LLCs. If I have an early morning appointment and it's raining, I know they're out covering slabs and will have to reschedule."

Small business owners in the building industry often re-invest all their profits back into the business, Rowell said, because it's likely to yield the highest return. However, that's not always the best long-term strategy.

"The typical person wouldn't go out and invest all their money in the stock of a single

company," said Rowell. "When you put all funds back into your business, that's what you're doing. There's no diversification to mitigate risk. So I say, 'Let's take a percentage of profits out of the business every year and do something with it that's going to help your future, help your family, your taxes – whatever your goals are,'" Rowell said.

While Financial Planning and Investment Advisory are generally long term in nature, Rowell also works with clients with more specific short-term issues.

"Most of what I see are debt issues, budgeting and spending issues, and for seniors, clutter issues," Rowell said.

"Clutter issues" refers to situations in which people have collected boxes and

boxes of financial documents over the years and become unable to organize, interpret, or access the documents they possess.

"It's hard for them to keep up with all of it," said Rowell. "I go in and tell them what to throw away and what to keep – we simplify their financial life by consolidating accounts."

Rowell understands that each company and each business owner is unique, and its financial plan should be, too. For further information call (843) 449-7805 or email WCRowell@EagleStrategies.com.

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