



CEP Financial, LLC ♦ 12345 Jones Rd. Suite 190 Houston, TX 77070 ♦ Main: 281.685.9715 Fax: 281.271.8146

Client Profile

Our firm's approach to financial planning can be very useful for those that can take advantage of our services. Clients who will benefit most from our services bring the following characteristics to a relationship with our firm:

1. Have \$200,000 of manageable assets
2. Prefer fee-only management for all their investment assets
3. Seeking ongoing investment management services