



CEP Financial, LLC ♦ 12345 Jones Rd. Suite 190 Houston, TX 77070 ♦ Main: 281.685.9715 Fax: 281-271-8146

Our Services

Financial Planning: Comprehensive financial plans including, retirement funding, tax planning, insurance, investment expenses, cash flow, and education planning.

Investment Management – Broadly diversified portfolios allocated to multiple asset classes with additional diversification within each asset class.

Objective fee-only advice - The only compensation we receive comes from our clients.

Communication - Communicating as often as needed to ensure our clients have peace of mind