



Stephen Cox CFP, CSA

Certified Financial Planner & Certified Senior Advisor

Testimonials

"I have known Stephen Cox for the better part of 12 years (maybe more).

During this time I have been continually impressed with his knowledge of the business but especially his integrity, which I consider second to none.

Stephen just doesn't try to sell you products as some financial planners do. He looks at the need and develops solutions that best fit the need.

I have found him to be the single source for all my financial planning and life insurance needs.

I have no hesitation in recommending Stephen to anyone. I have already introduced him to four of my friends, three of which are now clients also."

Allister K.

"Steven and I had an opportunity last evening, to reflect on the eye opening exercise that you took us through last week. We have learned so much from you about money and financial management in the almost 10 years that we've been working together.

We have found you to be very knowledgeable and thorough when dealing with us. You have always been customer oriented and very patient and informative. You have always allowed us enough time to make our own informed decisions.

We are exceptionally grateful for the care and patience your have displayed in working with us. Since we first met, we have engaged all of your services, as we feel that this gives us the highest probability of achieving our financial goals.

On a personal note, please do not hesitate to use us as a reference with any potential clients, who may be hesitant and sorting of their financial affairs under your watchful guidance."

Ann K.

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