Coggins Financial Services

Don Coggins LPL Financial Advisor

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Coggins Financial Investment Policy

What we do:
Determine investment choices and direction based on input from client meetings. All investments are not equal and some people will have more or less aggressive interest.

Why we suggest (Process):
What you say drives the selection process. We will put together a portfolio that aims to achieve your goals while maintaining a risk tolerance within your goal.

How we support your choices:
Working with Charitable Donors is different than personal investment plans. Donors may seek to provide for the support of the charity while possibly providing tax advantage plans for their estates. They could be seeking growth and return of some of the funds for their use while providing a Gift to their Church or Seminary that helps support the ongoing operations.

Some Donors have very specific plans as to how the funds are used, what areas they support, how their families are provided for through the generations. We help the Donors as well as the Institution determine the best way to accomplish these goals.

Insuring the process meets the plan.
Coggins Financial routinely monitors the performance of the Charitable Remainder Trust, or Gift Annuity to insure that your hard-earned funds are accomplishing the goals set forth by the family. We provide reporting for the Trust as needed, meet with the interested parties, and make investment changes when market conditions change.

We are proactive in communication and support with you to insure that your Church/Institution has a successful gifting program.