



Navigating Your Financial World

Welcome To Powell Wealth

Powell Wealth, established as Powell Financial in 1994 by David L. Powell, is a wealth advisory firm based in the Lake Norman area near Charlotte, NC. For more than 24 years, the firm has built a solid reputation helping our clients achieve financial security through the preservation and accumulation of wealth. Our team provides customized, dynamic solutions to business owners, executives and individuals to help them meet their financial goals. From retirement and estate planning, to business continuation and tax planning, Powell Wealth has the expertise, experience and knowledge to

Our Services Include:

[Investment Planning](#)

[Investment Management](#)

[Retirement Planning](#)

[Business Retirement Consulting](#)

[Estate Planning](#)

[Tax Planning](#)

[Charitable Giving](#)

develop a concrete financial strategy.

During the process of charting your financial course, Powell Wealth will help you prioritize your goals and work with you to develop a strategy that meets those objectives. Our ultimate mission is to help you achieve financial independence and peace of mind.

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"We consider it an honor when a client allows us to help preserve and protect the wealth they have worked so hard to earn."

- David Powell



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