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PROWELL FINANCIAL MANAGEMENT LLC - OUR STORY

Prowell Financial Management LLC (PFM) provides integrated planning services to high net-worth clients. Our clients are owners of large closely-held businesses who face complex personal financial matters. With over 25 years of experience, we are well-versed in lifetime asset transfer planning, trust strategies, life insurance, and business succession planning. We also offer a full range of investment services.



ESTATE PLANNING

Planning for the future is often neglected in the urgency of the moment. We bridge the gap between where your estate plan is now and where you wish it to be. [More](#)

INVESTMENTS

We are an independent investment consulting firm providing a broad-range of investment services that encompass the full range of our clients' financial pictures. [More](#)

LIFE INSURANCE

With inheritance taxes in excess of 40%, not having adequate liquidity can make the difference between the successful transfer of a business to the next generation—and financial crisis. [More](#)

PROWELL FINANCIAL MANAGEMENT LLC
BRIDGING THE GAP BETWEEN BUSINESS AND FAMILY FOR
SECURE FUTURES

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