



Financial professionals striving for superior results and lasting relationships.

ABOUT COZAD

02 GREG COZAD



STU AND MARY



Gregory D. Cozad, CFP®

Mary McGrath, CPA, CFP®
Stuart Meacham, CPA, ChFC®

Founded in 1972, Cozad Asset Management, Inc. provides the highest quality professional and personalized financial services and advice to individuals, families and institutional investors throughout the country. Our client-focused approach allows Cozad professionals to fully understand each client's personal financial situation, including investments, tax and insurance and to satisfy individual financial objectives and achieve long-term goals. Many clients find Cozad's specialized composites to be excellent additions to their portfolios.

OUR EXPERTISE



ASSET MANAGEMENT



INVESTMENT PORTFOLIOS

In June 2014, Cozad Asset Management, Inc. was named to the inaugural 2014 Financial Times Top 300 Registered Investment Advisors (RIA) list and has earned the distinction

We design solutions to achieve each client's unique financial goals while aligning with the client's investing preferences, risk tolerance, and holistic financial picture.

[Learn More](#)

Our portfolio managers bring specialized expertise to a variety of asset classes and aim to provide superior risk-adjusted performance.

[Learn More](#)

in 2015, 2016 and 2017.



FINANCIAL PLANNING & OTHER SERVICES

In our comprehensive wealth management review, we strive to understand your inventory of assets and liabilities, your cash inflows and outflows and how taxes come into play.

[Learn More](#)



FT 300 Ranking June 2017



FT 300 Ranking June 2014



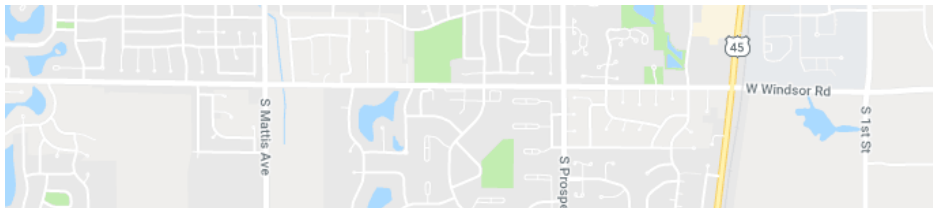
FT 300 Ranking June 2015



FT 300 Ranking June 2016

The Financial Times 300 Top Registered Investment Advisers is an independent listing produced annually by the Financial Times (June, 2017). The FT 300 is based on data gathered from RIA firms, regulatory disclosures, and the FT's research. The listing reflected each practice's performance in six primary areas: assets under management, asset growth, compliance record, years in existence, credentials and online accessibility. This award does not evaluate the quality of services provided to clients and is not indicative of the practice's future performance. Neither the RIA firms nor their employees pay a fee to The Financial Times in exchange for inclusion in the FT 300.

CONTACT US



COZAD ASSET MANAGEMENT INC

2501 Galen Dr,
Champaign, IL 61821

Phone: 217-356-8363
Toll-free: 800-437-1686

Securities offered through M Holdings Securities, Inc., a Registered Broker/Dealer, Member FINRA, SIPC. Investment Advisory Services offered through Cozad Asset Management, Inc. Cozad Asset Management is independently owned and operated. Cozad Asset Management, Inc. is an independent registered investment advisor. Cozad Asset Management, Inc. claims compliance with the Global Investment Performance Standards (GIPS®). For a fully compliant GIPS® Disclosure Presentation and a complete list of our composite descriptions, please contact us at (217) 356-8363 or (800) 497-1686. If you wish to initiate a securities transaction, please contact Cozad Asset Management, Inc. to discuss your transaction. Please do not leave instructions on voicemail or send via email or fax, as those instructions cannot be honored on a timely basis.

COPYRIGHT © 2015 COZAD ASSET MANAGEMENT, INC.