CookeCapital

Financial Future

As a dentist with an independent practice, your personal wealth is closely tied to your business. This makes managing your finances more complicated—and even more crucial. Yet you may lack the time or desire to oversee such financial planning. If you decide to work with a professional, then you face a new predicament: finding a wealth advisor with expertise in the issues specific to dentists.

From Day 1, our advisory firm has helped dental professionals and their families make confident decisions about their financial direction. From our offices in Goldsboro, N.C., and Wilmington, N.C., we provide wealth management services with a level of personalization that only a boutique firm can offer. Our team supports not only independent practices, but also corporate practices, independent dentists, associates, and employees.

And while we have expertise working with dentists, our practice has naturally grown into other areas because of the trust our clients place in us by referring their friends and family members. We help provide financial direction for individuals and families at all stages of life, as well as employers seeking to set up a workplace retirement plan.

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Our Expertise Is Personal

As the son of a dentist, our founder, Charles Cooke, CFP®, grew up watching the challenges with which his dad and colleagues struggled. They were busy people, dedicated to family and career, and they lacked access to the resources that could help them coordinate their professional and personal wealth.

As a financial planner and CERTIFIED FINANCIAL PLANNER™ professional, Charlie made it his mission to help dentists like his dad so they could feel more confident that their personal and business finances were on the right track. He founded Cooke Capital to guide dentists through all the stages of their career, from buying a practice to selling it, and everything in between.

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Tell Us About Your Dental Path

I'm just starting my
dental career or practice

How do I pay down my education debt,
thrive in my own practice, and start building wealth?

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I'm thriving in my
dental practice and am serious about building wealth

How do I know if I'm on the right path in
balancing career, family, and future?

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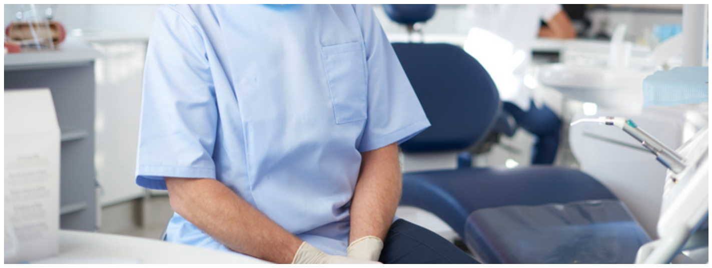

I'm ready to retire from my career as a dentist

What steps do I take to make sure my business and I are ready for this transition?

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Who Else We Help

I want to offer my employees a competitive retirement plan

How do I determine and manage the best plan for my company?

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We want to take charge of our finances and plan for the future

What should we do now to help ensure
a comfortable retirement?

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A Coordinated Approach

You will work one-on-one with a CERTIFIED FINANCIAL PLANNER™ professional, who will coordinate with other professionals such as CPAs and attorneys in evaluating all aspects of your finances. Your financial solutions will be designed to work together holistically to grow your wealth, minimize taxes, optimize your investments, and take care of your loved ones.

- Wealth Enhancement, Protection, and Transfer
- Retirement Planning
- Investment Planning
- Investment Management
- Cash Flow Management
- Insurance Planning

- Tax Planning
- Debt Management
- Education Planning
- Estate Planning

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Contact Us for a Complimentary Consultation

We offer a no-obligation meeting to assess how we can help you achieve your goals. Please contact us to get started.

SCHEDULE A COMPLIMENTARY CONSULTATION

plaque design) and CFP ® (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Financial advisory services offered through Acorn Financial Services, Inc. (AFAS), a Registered Investment Adviser. Securities offered through The Strategic Financial Alliance, Inc. (SFA), a registered Broker/Dealer. Charles Cooke is a Registered Representative of SFA and an Investment Advisor Representative with AFAS. Cooke Capital is otherwise unaffiliated with AFAS and SFA. Supervising office (703)293-3100.

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