



**ALLEN &  
COMPANY™**  
EST. 1932

TEAM DEVOTED



## Our Vision

**For you. Generous together.** When you do well, we do well, empowering us both to be generous, blessing those around us and our broader community. Our blend of culture, values, credentials, and experience uniquely suits this endeavor.

### Our Values

- We coach, counsel and connect.
- We are trustworthy and transparent.
- We are generous and kind.
- We are good stewards.

### Our Combined Credentials

- Chartered Financial Analyst®
- Four Certified Financial Planners™
- Accredited Investment Fiduciary
- Certified Kingdom Advisor™
- Doctor of Business Administration
- Retired Army Officer
- Three Client Service Associates
- Financial Paraplanner Qualified Professional
- Over 100 years of combined Advisor Experience

### Our Location

- Four Advisors in Viera Office
- Two Advisors in Lakeland Office
- Office Space in Winter Haven Office

### Additional Information

- Utilizing Linsco Employee Model
- Branded Allen & Company, Florida's Oldest Investment Firm
- Completed Succession Plans for 5 Financial Advisors
- Over \$580 M in Assets Under Advisement (as of 8.12.24)

### Prime Advisor Candidates to Join Our Team

- Sole Practitioners
- Transitioning to Semi-Retirement within 5 years
- Transitioning to Full Retirement/Book Sale within 5 years
- Currently with LPL
- Currently in an Employee Model with a Bank or Wirehouse

**FOR YOU. GENEROUS TOGETHER.**

[alleninvestments.com](http://alleninvestments.com)

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