Coordinated Care for Your Financial Health

This one-house team of specialists helps clients achieve success with a unique coordinated approach.

"When people think about their health, they know they need a primary care doctor who can refer them to specialists if the need arises," explains Joshua Bradley, lifelong Columbia resident and managing partner at one of the area's premier financial planning firms, Capital City Financial Partners. "I like to say it is the same with a financial advisor: You want a primary advisor who has access to specialists you might need.

"In medicine, your doctor will tell you to see a cardiologist for a heart problem, but you'd probably have to drive across town for the appointment," continues Bradley. "In our firm, we have licensed Investment Advisor Representatives, like myself, who have the primary client relationship, and we also have specialists for issues like trusts, taxes, estate planning, probate, philanthropy, and more—all under the same roof. You can go to one appointment and get all the expertise needed for coordinated financial care."

Capital City is a Registered Investment Advisor firm (RIA), not a brokerage—which means they are purposefully and legally different. "Most folks outside the industry only relate to financial advisors as brokers who are trying to sell you investment products," Bradley says. "As an RIA, our fiduciary duty is exclusively our client's best outcome, which can eliminate conflict of interest. I love that my clients can have added trust in our team with greater confidence."

CAPITAL CITY FINANCIAL PARTNERS

GROW: Prepare for your retirement

PRESERVE: Protect your assets

GIVE: Provide for the people and causes you care about

Capital Confidence Plan

When Bradley formed Capital City Financial Partners in 2015 out of his passion for helping people and families achieve their ideal retirement, he and his team put together the Capital Confidence Plan, a complimentary consultation process available to everyone at zero cost. "We believe in helping people plan and succeed, which always starts with sitting down together for a conversation."

After an initial meeting to discover a client's goals, dreams, and potential needs, the Capital City team goes to work behind the scenes. "We look at all the ways we could add value—again, at no cost," Bradley says, "and we come back to the client with a custom, tailored plan featuring our recommendations."

If it's a good fit, the official professional relationship begins with the implementation of the strategies presented. But it doesn't end there. In addition to offering frequent free seminars and philanthropic opportunities, the Capital City team meets with clients two to four times a year to evaluate progress. "We believe in the power of an ongoing relationship," Bradley says. "Our greatest success is helping our clients succeed and live life to the fullest."

CAPITAL CITY
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5111 Trenholm Road, Suite 100, Columbia, SC 29206 | 121 Executive Center Drive, Suite 203, Columbia, SC 29210 | 2650 Augusta Highway, Lexington, SC 29072

803-782-0671 capitalcityfinancialpartners.com