

Greg Powell

Thought Leader • Educator • Visionary

“No one is successful or fulfilled unless they touch the lives of the people around them.” —Greg Powell

One of the nation’s top financial advisors and a thought leader in the industry, Greg Powell has more than 25 years in the financial services field and as a mentor-advisor to other professionals. At the pinnacle of success with Morgan Stanley, he departed to build his own financial services practice and to create and deploy Your Financial House®, a revolutionary system for wealth management.



Considered “the solution” to serving the financial planning and security needs of today’s investors, Your Financial House is a unique process, which takes advisors to new levels of success with customer acquisition, satisfaction and retention. The patent pending process allows the advisor to rise above the competition by offering the ultimate client experience.

Powell provides training, coaching and consulting to the financial services industry as founder of fiSMART, an educational company that licenses the Your Financial House system. Through fiSMART, his services range from national speaking engagements to meeting with and advising senior management of the financial services industry to working directly with advisors.

A strong believer that those advising the financial services industry need not only to understand the trends but to experience the trends on a day-to-day basis, Powell is president and CEO of fi-Plan Partners. In this capacity Greg advises organizations, families and individuals who wish to enhance and preserve their wealth. Fi-Plan Partners offers securities through LPL Financial, member FINRA/SIPC.

In 2002, Powell was one of five investment professionals Research Magazine inducted into its “Advisors Hall of Fame,” an honor reserved for those who are, according to the editors, “judged by their clients, their colleagues, and by industry notables as representing the very best the industry has to offer.”

Powell is also a member of the Investment Management Consultants Association (IMCA), CIMA Professional, and attended the Senior Financial Advisors program at the University of Pennsylvania’s Wharton School.

Along with these professional accomplishments, Powell is chairman of Samford University School of Business Advisory Board, president-elect of the Alumni Association and active member of the Athletic Foundation. He’s also on the scholarship committee and advisory board with Camp Smile-a-Mile, an organization that provides no-cost events for children undergoing cancer treatment and their families, on the school board for his local Catholic church, vice-chairman of the Board of Special Equestrians, and on the corporate board of directors of Savela Solutions. Powell and his wife, Peggy, live in Hoover, AL with their three children, Sara, Audrey, and Lydia.

He’s fond of noting that his daughters have been some of his best teachers about the financial profession. Each of them has already given him a profound piece of wisdom or insight into how to make his services and strategies more accessible and more useful. “If I can discuss it with my children, and see their faces light up with excitement and understanding,” he says, “then I know I’m ready to share it with the rest of the world.”

To learn from a visionary with sound information, comprehensive experience and industry-wide success, contact Greg Powell today at gpowell@fismart.com.

About **fiSMART** teaching success financially

fiSMART is an educational company that provides training, coaching and consulting for the financial services industry, introducing systems and services designed to bring all aspects of financial planning under one roof, thus helping financial advisors improve their service while lessening clients’ anxiety.

fiSMART specializes in:

- Educating and consulting with financial professionals
- Delivering programs for financial institutions, including banks, money management and investment firms, insurance and independent financial advisors
- Speaking at corporate-sponsored events that give executives and employees greater understanding and appreciation of their personal finances

fiSMART’s mission is to “teach success financially,” which is done through licensing, workshops, seminars, one-on-one coaching, and institutional consulting. The firm consistently creates products designed to help members of the financial services industry better serve their clients and realize greater personal success at the same time.

Financial institution leaders and other financial planners can contact fiSMART through our website www.fismart.com for current seminar schedule or to register for upcoming programs or you may call 205-989-7871 (Birmingham, AL) or toll free 888-989-7871.

**Contact us to get started with fiSMART® and
Your Financial House® today!**