



*C<sup>2</sup> Wealth Strategies is an independent financial advisory firm located in Mobile. Pictured above from right to left are Wesley Coody, Michael Maskill, Greg Andrews and Joseph Lomax.*

# C<sup>2</sup> Wealth Strategies Works to Create Wealth Without Limits

Back in 2010, Wesley Coody had a vision -- merging two core businesses, holistic financial planning and employee benefits, under one brand with one unique culture.

The result of that vision is C<sup>2</sup> Wealth Strategies, an independent financial advisory firm focused on helping its clients reduce their financial worry and create wealth without limits.

C<sup>2</sup> Wealth Strategies is the Mobile Area Chamber's Small Business of the Month.

The company was founded in June 2010 after acquiring a company in which Coody was once a partner: Lender and Associates. C<sup>2</sup> Wealth Strategies was then built on four founding principles: making the complex simple; looking at the bigger

picture; believing in performance; and their main responsibility, respecting and protecting their clients' wealth.

"C<sup>2</sup> Wealth Strategies is a firm who is passionate with a purpose," said Coody, who serves as the firm's president.

"At our core, our responsibility is managing our clients' hopes, dreams and desires by listening to our clients to understand their financial situation and future expectations."

Coody is passionate about more than wealth management. He is treasurer of the Augusta Evans School Foundation and a member of the development council of USA Children's and Women's Hospital and the U.S. Small Business Administration's Emerging Young Leaders.

"After losing a brother at a very early age, I wanted a way to give back to our community that our whole family could be proud," he said. "As the treasurer of the Augusta Evans School Foundation, I am especially proud of a couple of things we have accomplished. We were able to raise enough funds to provide a playground designed purposely for kids at Augusta Evans with special needs. (Also) we are extremely proud of our teacher grant program at Augusta Evans School. (It) allows the teachers at Augusta Evans to purchase technology that makes a difference inside and outside of their classroom."

The financial world is always evolving, and Coody says

Challenges in the industry include the quality of advice available to middle-class clients, and the emergence of digital platforms that aim to take the human advisor out of the process. Coody believes human interaction will always be needed in some form, however.

"Planners and advisors manage more than just money," he said. "We manage our clients' expectations and most importantly, we manage our clients' emotions."

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A volunteer committee reviews submitted applications and selects a business to be featured in each issue as the Small Business of the Month. Criteria for this designation includes employing less than one hundred people, a member in good standing of the Mobile Area Chamber and sales or profit growth

the business view DECEMBER 2018/JANUARY 2019

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