



Wealth Management

Pensacola
(850) 470-5555

Fort Walton Beach
(850) 275-1250

Destin
(850) 337-2420

Foley
(251) 943-8571

wealth@osullivancreel.com

www.ocwealthadvisors.com

Wealth Management Services

Life is full of decisions and finances permeate every aspect of life. Making wise decisions and avoiding unforeseen pitfalls throughout life is the key to accomplishing goals. O'Sullivan Creel Wealth Advisors, LLP brings each piece of a financial situation together and integrates our client's values and goals with objective and innovative solutions. On an ongoing basis, the team helps clients see how decisions or changes in their situation may affect their ability to accomplish their goals.

At O'Sullivan Creel Wealth Advisors, we specialize in helping individuals and families manage their wealth with purpose. We are an independent Registered Investment Advisor (RIA), dedicated to helping our clients manage their wealth in order to meet their goals. From investment management and tax considerations, to estate planning and risk analysis, to philanthropic strategies, our team stands ready to help you make the financial decisions that matter.

Services within this holistic wealth management include:

- Financial planning
- Investment management
- Cash flow optimization
- Risk management and insurance
- Debt analysis and structuring
- Education funding
- Retirement planning
- Business succession planning
- Estate planning and charitable giving
- Tax planning

O'Sullivan Creel Wealth Advisors, LLP and O'Sullivan Creel, LLP work very closely together on joint clients to minimize taxes and review tax planning opportunities. The synergy between the two firms is intended to produce a complete and coordinated effort that benefits the client.

Wealth With Purpose.



O'SULLIVAN CREEL
Wealth Advisors, LLP