

Looking to Grow, Together

Terrell & Associates, LLC

Many financial advisors and planners don't want to know you until you've made your first million or two. That's definitely not the case at Terrell & Associates.

"I'm more interested in somebody who is willing to grow together with us than somebody who has significant amounts of money," says President Roland Terrell. "We really are the only firm I know of where you can start with us at the beginning of your financial career and stay with us all the way through retirement and beyond. We are here to 'Create, Grow, Preserve and Protect' wealth, from the beginning to the distribution phase, including future generations.

"Most of our competitors won't deal with somebody just starting out," he adds. "We really are open to that long-term relationship. Our goal is helping you go from Point A financially to Point B and monitoring it all the way on a regular basis."

Terrell & Associates has been serving the people of Southwest Louisiana and Southeast Texas for more than 40 years. Roland's father started the business selling weekly-premium life insurance policies door-to-door in the 1960s. When clients began asking for products he didn't have access to as an insurance agent, he merged with a broker-dealer.



Roland Terrell

Today, Terrell & Associates is a full-service business, financial and estate planning firm offering investments, insurance and tax strategies for individuals, small businesses, corporations and professional practices.

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– Roland Terrell

Roland Terrell joined the firm in 1983. A life and qualifying member of the Million Dollar Round Table, he holds a life and health insurance license plus the Series 6, 7, 26, 63 and 65 securities registrations. He has served in various capacities with the National Association of Insurance and Financial Advisors,

including local president. He is a board member of the area Better Business Bureau and past board member of several national and local organizations, including many charities.

Understanding Clients' Needs Before They Do

Because of the close relationships the firm forms with its clients, Terrell & Associates often knows their needs before they do.

Like the time Terrell helped a long-time client understand – almost the hard way – the importance of incorporating his business from a risk perspective.

"We were driving down the road together and we almost got hit by one of his company's trucks," Terrell says, noting that the client opened himself to a personal lawsuit if an accident had happened.

That's what comes from having a long-term relationship with your clients.

"When you ask them why they deal with us, most of our clientele will say it's because they know we are going to be there when they want and need us. We pride ourselves on returning every phone call within one day. You hear that everywhere, but we do it," Terrell says.

"My commitment to you is that I'm going to be sitting at this table five, 10, 15 years from now."



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