Douglass Financial Services

Simplicity. Confidence. Freedom.

An Independent Firm Focused on You

Douglass Financial Services is an independently owned financial consulting firm offering over 30 years of client service. We are dedicated to providing unbiased advice, impeccable service, and diversified financial resources to individuals, families, retirees, farmers, and small-business owners. We have aligned with Cambridge Investment Research, Inc., one of the most respected independent broker-dealers in the industry. Our affiliation with Cambridge enables us to provide objective advice, customized services, superior technology, and an open architecture platform. Together, we offer the objectivity of working with an independent financial firm with the ability to access the world's financial markets and a wealth of investment resources.

A Trusted Resource

We believe we have been called to help people experience freedom in their financial lives and impact those who they care about most. We serve as a trusted resource, providing clients with timely advice and access to a broad range of financial products. As clients' situations become more complex, we strive to bring together the tools and professionals who can help. Through accountability, competency, and mutual trust, we make a positive difference in the lives of our clients and their families.

Encouraging Financial Freedom

We understand the challenges of helping our clients plan for today while thinking about the legacy they want to leave. Our promise is to listen and counsel, encouraging balance and evaluating different options to determine what makes sense for the long run. We believe this sort of planning should be based on careful consideration and professional guidance to ensure all details are attended to. We coordinate with other skilled professionals, such as your attorney and accountant, to facilitate an appropriate plan to meet your specific needs.

Lending Our Expertise to Make Things Simpler

Douglass Financial Services was started by our father, Samuel Douglass, in 1973. We are committed to continuing our family legacy by educating our clients and their families. Part of this commitment includes meeting with clients on a pre-determined basis to discuss legacy (estate and life insurance) planning, cash flow/income planning, tax and distribution planning, and investment allocation. We are pleased to offer free consultations with client family members and friends who have financial questions.

Making an impact in the lives of our clients.

David Douglass, Partner

David joined Douglass Financial Services in 2005. He earned a Bachelor of Arts degree in history, with a minor in economics from the University of Illinois at Urbana-Champaign. He currently holds FINRA Series 6, 62, 63, and 65 licenses, in addition to life and health insurance licenses.

David is active in the Kogudus Renewal Ministry at his church and volunteers in his children's school library. In his free time, he enjoys camping, hiking, biking, basketball, tennis, traveling, and reading.

Douglass Financial Services
305A West Washington Street
Pontiac, Illinois 61764
Ph: 815-842-4393
david@douglassfinancial.com
www.douglassfinancial.com