



## COGHLAN FINANCIAL GROUP LLC

**C**oghlan Financial Group, LLC, a financial services organization located in San Diego and San Ramon, has always been one step above the rest. Since March 2002, the company's focus has been to develop investment strategies for individuals preparing for retirement.

J. Graydon Coghlan, a San Diego native, is the type of individual to blaze his own path. An entrepreneur from an early age, he saw himself at the forefront of financial planning. Graydon's plan was twofold: become known as the "retirement specialist" to employees at local

large companies and develop a referral base from word-of-mouth business.

After years of developing their expertise at Smith Barney and Merrill Lynch, Graydon, along with Josh Willard, founded Coghlan Financial Group LLC. The team's vision was to build a premier financial services organization and to provide indi-

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viduals with a unique financial approach to retirement planning.

Josh's sincere interest in helping clients achieve their goals is an attribute not easily found in financial professionals. Josh handles all investment-related transactions and client service activities, and as a team he and Graydon have discovered the key to properly planning an individual's financial future: patience.

"Retirement planning is not something that can be rushed," Graydon states. "We ensure each individual's retirement objectives are met and that they are comfortable after separating from the working world."

"We want each person to feel like they are meeting with a friend, not only a financial advisor," Josh adds.

The company's motto, "We Make Your Retirement Work for You," reflects the staff's commitment to help you reward yourself for your hard work during your employed years. Thanks to their vision, many have seen their financial dreams come true.

Coghlan Financial Group LLC is located at 4370 La Jolla Village Drive, Suite 630. The firm offers a wide range of investment-related products and services through its broker/dealer, Securities America Inc. The firm also has access to an array of mortgage and estate planning professionals. More information can be found at [www.coghlanfinancial.com](http://www.coghlanfinancial.com) or by calling 800-884-5121.