

**Who We Are:**

We are a full-service team of investment professionals dedicated to helping both individuals and families. We are committed to maintaining professionalism and integrity and we follow prudent practices when implementing financial strategies for our clients. We take an objective, unbiased approach and tailor our recommendations to each individual client situation.

**What We Do:**

The Fowler Group takes a comprehensive approach to the management of your financial life. Through goal-based financial planning and a hands-on process, we strive to ensure your custom plan stays in line with your goals. Areas of focus include Financial Planning, Retirement Planning, Insurance Analysis, Estate Planning and Investment Management.

**Why We Do It:**

At The Fowler Group, we believe continuous, long-term planning is essential. Whether focused on living well in retirement, or have more specific goals such as ensuring you have the right amount of insurance, we have all of the resources to help holistically manage your wealth.

**Who We Work With:**

- Individuals and Families
- Company Executives and Small Business Owners
- CPAs and Attorneys
- Divorcees and Retirees
- Institutions, Foundations and Non-Profits

**Questions to Ask:**

- Do you have a Financial Advisor? If so, are you happy with your current Financial Advisor?
- In regards to individual investments, do you know what you own and why you own it?
- Do you have defined financial goals and is your saving and investment plan designed specifically to help you meet those goals?
- Are you covered by an appropriate amount of life insurance so that in the event of your premature death, your loved ones would be cared for?



## Meet Our Team:



**R. Andrew Fowler, AIF®, AWMA®**  
Senior Vice President, Investments | Managing Director

Andrew began his career as a Financial Advisor at Morgan Keegan in 2002, which is now Raymond James through a merger of the two companies in 2013. As the senior partner on the team, Andrew acts as a wealth management consultant with a primary focus on goals-based investing. He provides cohesive vision to help ensure client needs, wants and wishes are met with as much certainty and as little risk as possible.

[Andrew.Fowler@RaymondJames.com](mailto:Andrew.Fowler@RaymondJames.com) // T 615.645.6715



**Nicole McLeod, CFP®, AIF®**  
Certified Financial Planner™ | Financial Advisor

Nicole began her career in the financial services industry at Morgan Keegan in 2007, and then partnered with Andrew in 2011 to create The Fowler Group. The team became a part of Raymond James through a merger of the two companies in 2013. As a financial planner, Nicole creates, implements and monitors our clients' financial plans. She strives to help clients achieve their financial, personal, professional and philanthropic goals during their lifetime.

[Nicole.McLeod@RaymondJames.com](mailto:Nicole.McLeod@RaymondJames.com) // T 615.645.6716



**Chris R. Boyd, CRPS®, AAMS®**  
Chartered Retirement Plans Specialist<sup>SM</sup> | Financial Advisor

After spending almost 10 years at ING honing his expertise with retirement plan providers, he found that it's the financial advisors who have the deepest relationships with clients and are best positioned to make lasting, positive change to the retirement plans they serve. So, in 2014, Chris joined The Fowler Group at Raymond James as a financial advisor, specializing in retirement plan consulting for corporate and nonprofit retirement plans including 401(k) and 403(b) plans.

[Chris.Boyd@RaymondJames.com](mailto:Chris.Boyd@RaymondJames.com) // T 615.645.6717