



Lindell G. Douglas, CFP®
Managing Partner

Lindell Douglas is a CERTIFIED FINANCIAL PLANNER (TM) professional (CFP®) who has been serving clients since 1998. Certified by the Certified Financial Planner Board of Standards in Washington, DC. CFP® certification marks identify professionals who have met the high standards of competency and ethics established and enforced by CFP® Board. CFP® Board's Standards of Professional Conduct require CFP® professionals to act in their clients' best interests. His client base consists of retirees, pre-retirement clients, small businesses, cities, and charitable organizations.

As the Managing Partner, and Founder of LDA Wealth Management in Plantation, FL, he is a successful financial planner serving clients nationwide. He oversees the operation of his financial planning practice. His discipline includes: Asset Management, Retirement Planning, Retirement Income Strategies, Education Funding Strategies, Estate and Legacy Planning, Risk Management, Investment Strategies, Fixed Income Strategy, Business Planning and High Yield Savings Opportunities. *(Securities offered through J.W. Cole Financial, Inc. Member FINRA/SIPC. Advisory services offered through J. W. Cole Advisors, Inc. LDA Wealth Management, Inc., J.W. Cole Financial, Inc., and JW. Cole Advisors, Inc., are unaffiliated entities).*

He earned a BSc degree in Finance with honors at the University of Phoenix and was inducted Delta Mu Delta International Honor Society in Business, and his CFP® course study from the College for Financial Planning.

Lindell was awarded the Broward County Council of Chamber Small Business Person of the Year 2014. Legacy Magazine recognized Lindell as one of South Florida's Most Powerful and Influential Black Professional in Business and Industry in 2015. Over the years he has received numerous other recognitions for business and sales growth.

Lindell is a contributing writer for an article called Financially Speaking published in the Caribbean National Weekly Newspaper, Legacy Magazine, and the Doral Tribune.

He is also the President and Founder of The Galleon Foundation, an organization that provides scholarships to disadvantaged children in the USA and Caribbean with four signature events each year (Galleon Open Golf Classic, Caribbean Village Music Festival, Miss Jamaica Diaspora, and The Galleon Scholarship Gala).

Lindell is a person who believes that giving back to his community is essential for the development of the next generation. Through his foundation he has given more than \$25,000 annually to scholarship. He established a \$5,000 annual scholarship at FMU for Caribbean and African American Students.

He is married to his lovely wife Cheryl Levy-Douglas and enjoys fishing, golf, and discovering new places.