



LOUIS B. WINDAWI

Generating Income for a Lifetime

- Wealth management and retirement income strategies
- Extensive IRA distribution planning training by Ed Slott, CPA
- Comprehensive financial, investment, tax and estate planning

Areas of Focus: Retirement Planning, Investment Management, Tax Planning
Designations: Certified Financial Planner, Accredited Wealth Management Advisor

Louis and his team specialize in addressing the needs of retirees by generating income, reducing risk, simplifying investment solutions and providing ongoing advisory services to help clients retire with confidence. His clients have accumulated wealth, are now transitioning into retirement and need to start generating income they can rely on for the rest of their lives. This requires a major change in financial tactics and mind-set to successfully manage a series of high-stakes risks. His approach is comprehensive and proactive, requiring his client's consistent involvement and input, giving clients confidence so they worry less about their investments and think more about enjoying retirement.



LOUIS B. WINDAWI, CFP®, AWMA™
Wealth Management and Retirement Income Strategies

1422 Edinger Ave, Suite 220 • Tustin, CA 92780
Phone: (714) 258-9911

louis.windawi@lpl.com • www.louiswindawi.com

Louis Windawi is a branch manager with, and securities/advisory services are offered through LPL Financial, Member FINRA/SIPC