



Greg Powell: President and CEO, fi-Plan Partners



As President and Chief Executive Officer of fi-Plan Partners, LLC, in Birmingham, Alabama, Greg Powell works directly with clients to enhance their quality of life. The creed by which he conducts his business and life is, “No one is successful or fulfilled unless they touch the lives of the people around them.”

Powell is an independent wealth consultant with more than 27 years experience in the financial industry. He’s a member of the Investment Management Consultants Association (IMCA) and has attended the Senior Financial Advisers program at the University of Pennsylvania’s Wharton School.

He also is the creator of Your Financial House®, a management tool designed to bring all aspects of financial planning under one roof. Built on a foundation of helping clients reduce their anxieties, enhance their strengths and give them the knowledge to do both, this unique program enables people to achieve the often-elusive goal of financial independence as they define it—to achieve the American Dream.



your financial house

In 2002, Powell was one of five investment professionals *Research* magazine inducted into its Advisors Hall of Fame, an honor reserved for those who are, according to the editors, “judged by their clients, their colleagues, and by industry notables as representing the very best the industry has to offer.”

Along with these professional accomplishments, Powell is the former Chairman of Samford University’s Brock School of Business Advisory Board, President of the Samford University Alumni Association and an active member of the Athletic Foundation. The Brock School of Business chose Greg as their 2009 Alumnus of the Year. He is also a board member of the National Federation of Independent Business (NFIB), the recipient of the NFIB 2009 Small Business Champion Award for Alabama, a member of the Business Council of Alabama, on the Corporate Board of Directors of Savela Solutions, on the Scholarship Committee and Advisory Board with Camp Smile-A-Mile, an organization that provides no-cost events for children undergoing cancer treatment and their families, the Chairman of the Reach Out and Read Advisory Board, on the Board of Directors for Aldridge Botanical Gardens, a Trustee for the Hoover Chamber of Commerce, on the Board of Directors for the Birmingham Tip-Off Club, and Chairman of the Board of Special Equestrians. Powell and his wife, Peggy, live in Hoover, Alabama with their three children, Sara, Audrey, and Lydia.



Greg gives commencement address at Samford University

Powell is fond of noting that his daughters have been some of his best teachers about the financial profession. They have already given him a profound piece of wisdom and insight into how to make his services and strategies more accessible and more useful.

“If I can discuss it with my children, and see their faces light up with excitement and understanding,” he says, “then I know I’m ready to share it with the rest of the world.”



The media consistently looks to Greg as an expert in the financial industry

fi-Plan Partners®

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