



PERRY JEFFRIES III



PERRYJEFFRIES.COM

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“We help entrepreneurs and professionals solve their financial problems so they can focus on chasing their dreams” - C.F.O.

INDIVIDUAL

- EXPAND PERSONAL FINANCE INTELLIGENCE
- RECEIVE A WRITTEN FINANCIAL BLUEPRINT
- DEVELOP AND NURTURE A WEALTH CREATION MINDSET
- TRANSITION FROM A JOB TO YOUR BUSINESS

BUSINESS

- DRIVE AND INCREASE DOUBLE-DIGIT PROFITS WITHIN YOUR BUSINESS
- SAVE TEAM - TIME, ENERGY AND MONEY
- OPTIMIZE TAX REDUCTION STRATEGIES
- INSTALL PROVEN CASH MANAGEMENT SYSTEMS

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HERE'S HOW I CAN
HELP YOU...



DIAMOND EQUITY
ADVISORS

INDIVIDUAL AND FAMILY FINANCIAL
PLANNING



PROFIT ACCELERATOR SMALL
BUSINESS SYSTEM

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Expert, Experience, Results

- 34 COMBINED YEARS IN THE WEALTH, HEALTH AND CONSULTING INDUSTRIES
- SERIES 7 (SECURITIES BROKER) AND SERIES 66 (INVESTMENT ADVISOR) LICENSED
- LIFE & ANNUITY INSURANCE LICENSED
- JOHN MAXWELL CERTIFIED SPEAKER & COACH
- CERTIFIED PROFIT FIRST PROFESSIONAL
- CRPC - CHARTERED RETIREMENT PLANNING COUNSELOR
- CPFA - CERTIFIED PENSION FIDUCIARY ADVISOR
- MANAGED OVER \$70 MILLION IN CLIENT ASSETS
- DAYMOND JOHN RISE & GRIND AMBASSADOR
- PES - PERFORMANCE ENHANCEMENT SPECIALIST

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CORPORATE WORKSHOPS



CLIENTS



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Testimonials



Sylvia C.
Assistant Coach
North Carolina Tarheels I-Coach

Perry Jeffries has been my CFO for over 10 years. We met during my transition from professional basketball in the WNBA to collegiate coaching. On our first meeting, he took time to explain, in layman's terms, what I needed to know to take the first step to maximizing my capital gains, improving my net worth, and living financially free. Throughout the years, Perry has met with me regularly to assess my risk tolerance and to review my portfolio. Today I am debt free and living the financially free lifestyle that Perry discussed with me in our initial meeting.



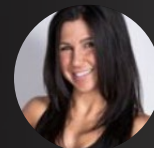
Orelle Jackson
Limitless Growth LLC

As my CFO, Perry has provided me with sound financial advice that was truly tailored to my needs and my situation. But more than providing me with solutions, he educated me so that I am better informed to make better decisions. Perry has helped me to prepare to transition into entrepreneurship. This was scary territory for me, but with knowledge and planning, I have been able to make an enormous jump into running my own business.



Antonio Reese
Reese Realty

My wife and I had the pleasure of meeting Mr Jeffries back in 2007. One of things that stood out about Perry was his energy and passion to teach others in the area of finance. We were looking for an advisor that had the heart of a teacher, and was passionate about serving others. His core values, and ours were a match. We have been in partnership over 10 years, and look forward to many more years of friendship and success.



Lea G.
Maximize Fitness

Owning a facility AND being the primary operator/decision maker can be incredibly overwhelming and time consuming. My focal point is always on my clients, not myself, therefore I was "dropping the ball" on my personal and financial health. That's where Perry comes in. He helps you set realistic goals, builds an efficient timeline, and reassures you that your expectations are within reach. A true coach, he holds you accountable, sets deadlines, and always ensures success!

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Testimonials



Lakisha Barclay
SOS 1040 Plus, LLC

I was struggling with the idea of professional growth. I had grown comfortable in my position and career. Since taking the course, I made the decision to grow professionally by sitting for two different certifications. I have successfully completed the first and am now an IRS Enrolled Agent. I am currently pursuing the Certified Association Executive and hope to have it completed by summer 2018. Without the experience with the group, Mr. Jeffries and the book, I do not believe that I would have had the courage to step out of my comfort zone.



Sara Jacobowitz
Hands On Therapy, LLC

I did pretty well for myself with not really knowing what I was doing. My dad Always said to put money aside and save for my future and retirement especially since I am an entrepreneur. I went to my bank and said "I'm not sure I know what I am doing but please set up a retirement account for me". They could have talked to me in a foreign language, but Perry sat me down and explained to me what I should be doing with each account and he made it simple to understand.



Sandra Moody Gresham
Dehan Enterprises
Insurance & Financial
Services LLC

As an insurance professional, I look for partners who can provide not only expertise, but passion for improving the lives of my clients. I found that in Mr. Perry Jeffries. He's knowledgeable, smart, personable and communicates the message in a manner people understand, and this leads the client act.



Bridgett J.
Cafe Wakefern, LLC

Hello! My name is Bridgett and I'm the Founder of Café Wakefern Home Dog Boarding. I became of client of Perry because I was new to entrepreneurship and desperately needed direction and structure. I was struggling financially and also trying to improve my credit score. Since working with Perry, I've set a hard date of October 2018 for being self-employed, have cultivated a very promising business and was recently invited to be a Black Card Member with Master Card.

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