Experience The Service Difference

Welcome To

Advanced Investments

120 East 2nd St.   Ottawa, Ks   (785) 214-4677

About Us

In 2017, building on 12 years of experience as a financial advisor with Edward Jones and Merrill Lynch, Joseph Randall decided to open Advanced Investments in Ottawa, Kansas choosing LPL Financial as our Broker Dealer.

The company was founded with a vision of educating clients in a transparent and simple manner that allows them to understand their investments and feel comfortable with pursuing their financial goals in a systematic manner. Quality communication with our clients is of the utmost importance to our team and it's how we ensure our client's experience the best service our team has to offer.

Our team has grown to 3 advisors, Joseph Randall, Jarred Sterling, and Landon Randall. Utilizing our team's comprehensive experience, we help our clients pursue their financial goals.

Meet Our Team

Joseph Randall- Founding Partner & Sen. Advisor

Joe has been a Financial Advisor since 2005 and holds his Series 7 & 66 securities registrations with LPL Financial, as well as being life insurance licensed. Joe graduated from the University of Kansas with a Business degree where he focused on Business Administration and Economics.

Jarred Sterling- Financial Advisor & Partner

Jarred secured his Series 7 & 66 securities licenses in 2022 and they're currently held with LPL Financial. He graduated from KSU with a Bachelor's degree in Agribusiness and worked as a commercial lender for 24 years prior to joining the team. Jarred is an active member in the local Ottawa community.

Landon Randall- Financial Advisor & Partner

Landon acquired his Series 7 & Series 66 licenses with LPL Financial in the Spring of 2023. Prior to Advanced Investments, he started his journey as a Personal Trainer. Transitioning to the finance sector in 2022, he became a commercial life insurance agent. Landon has a passion for helping people plan & pursue their future goals.

What We Offer

Investment Services

We specialize in portfolio design that aligns with your individual goals, risk tolerance, and liquidity needs. Contact one of our Financial Advisors to schedule a complimentary consultation. To learn more, see the next page.

Financial Planning

Our financial planning services can help you sift through the overwhelmingly complicated world of finance and build a path that helps achieve confidence for your future. If you are interested in financial planning, contact one of our Advisors to schedule a discovery appointment!

Wealth Management

Wealth Management services are for dual clients who utilize both our investment and financial planning services.

Investment Services

Account Availability

Brokerage

Brokerage accounts don't include a regularly scheduled Advisor Fee. Instead, you pay a commission fee for every transaction. This commission amount is figured as a percent of a transaction amount and can change based on the type of investments or transactions.

Advisory

Advisory services include an Advisory Fee that is billed to you quarterly. The Advisory Fee amount is figured as a percent of your assets managed within the account. The percent can vary depending on the type of portfolio and management style.

FAQ's

- How do your Advisors get paid?

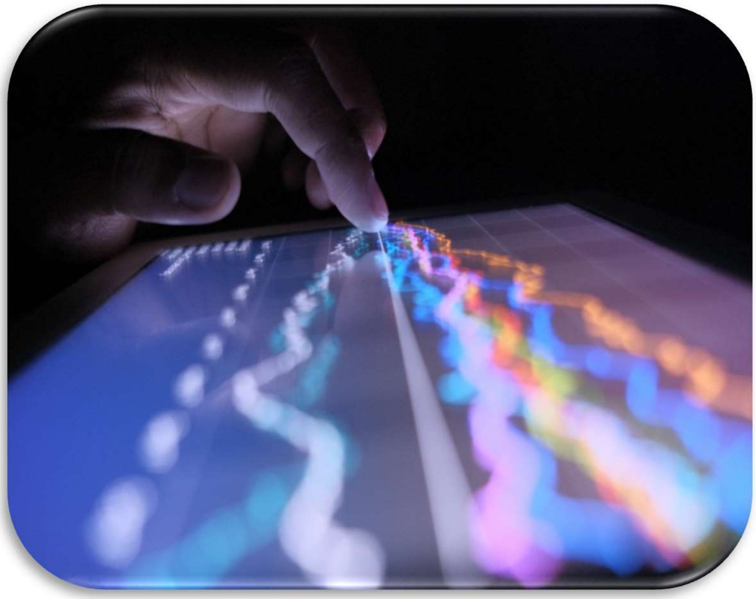
*To the left is an explanation based on the type of accounts we manage.

- What is included with an Advisory Fee?

*Generally speaking, you get the expertise and advice of all 3 of our Financial Advisors. Certain investments may also have extra internal fees that are not included with the Advisory Fee.

- I already have an Advisor, but I want to see what you have to offer. Does a consultation cost anything?

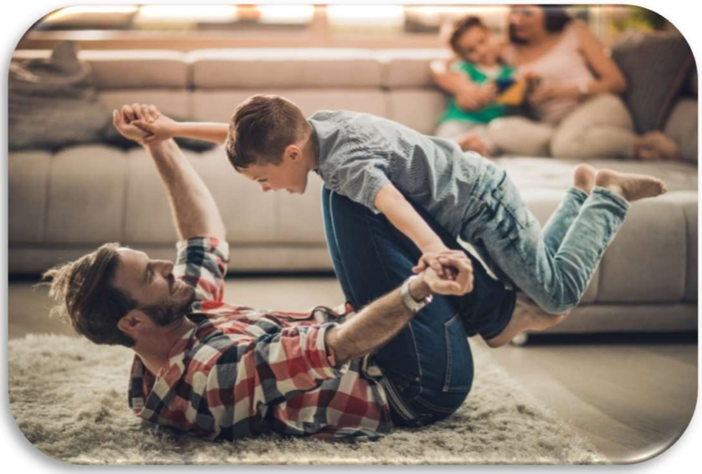
*No! Our team can review your portfolio and give you an initial consultation for free!



Financial Planning

Retirement Planning

Retirement is an exciting time in life! You shouldn't have to worry about finances as you're approaching it. Our retirement planning services can help further your understanding of where you want to be financially during retirement and the actions you can take now in order to work towards your goal.



Education Planning

Education planning can be a helpful tool when thinking about your or your children's future. We can help you plan & prepare for future education expenses.

More comprehensive plans are available. If this is of interest to you, contact our advisors for a discovery appointment!

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