Investment Management

As Independent Advisors, we have a fiduciary duty to our clients: Their interest always come first. We provide personalized advice and guidance, with a focus on the client relationship. In order to offer this level of personalized service, how we engage with clients may vary to ensure that we are meeting their specifics needs and goals.

Value of our Investment Process

While each Client is different based on their specific goals, objectives, and needs, our process includes understanding, evaluation and development as needed of the following:

- Goals and Objectives Review
- Risk Tolerance Analysis
- Overall Net Worth Analysis
- Investment Management
  - » Investment Policy Statement with Portfolio Selection and Monitoring
  - » Knowledge of Investment Policy Committee consisting of 22 Team Members with over 18 average years of industry experience
  - » Fiduciary Level Advisory
  - » Portfolio construction and evaluation integrated with tax and estate needs
  - » Asset Allocation Review
  - » Portfolio Rebalancing
- Savings and Budgeting Strategies

Investment Advisory Relationship

The primary service is our investment advice and management of your assets. Your annual cost under an investment advisory account is an agreed-upon percentage of the assets held in your account. This annual cost starts at 1.25% and decreases as your assets increase.

Duncan
FINANCIAL GROUP

311 Main Street | Irwin, PA 15642 |
DuncanGRP.com | 724.863.3287