Services Tailored to Our Clients' Needs

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.

Duncan FINANCIAL GROUP

Investment Management

Appropriate for clients looking for investment advice.

- Goals and Objectives Review
- Risk Tolerance Analysis
- Overall Net Worth Analysis
- Investment Management
- Asset Allocation Review
- Portfolio Rebalancing
- Savings / Budgeting Strategies

Private Wealth Management

Appropriate for clients looking for advice that looks at their entire financial picture.

- Goals and Objectives Review
- Risk Tolerance Analysis
- Overall Net Worth Analysis
- Investment Management
- Asset Allocation Review
- Portfolio Rebalancing
- Savings / Budgeting Strategies

Comprehensive Financial Planning, including:

- Cash Flow Analysis
- Retirement Needs Analysis
- Income Distribution Strategies
- Risk Management Analysis
- Estate Plan Review
- Private Client Website
- Secure e-Document Organizer

Duncan Premier Planning Group

Appropriate for clients who have complex advice needs requiring multiple professionals.

- In-Depth Review and Analysis of:
  - » Goal and Objective Review
  - » Risk Tolerance
  - » Net Worth
  - » Cash Flow
  - » Savings / Budgeting Strategies
  - » Asset Allocation
  - » Risk Management
  - » Retirement Needs
- Comprehensive Financial Plan
- Customized Investment Policy Statement
- Accredited Investment Strategies
- Income Distribution Strategies
- Multi-Generational Planning and Gifting
- Charitable Gifting Strategies
- Risk Mitigation Strategies
- Tax Planning and Family Gifting Strategies
- Tax-Optimized Investing
- Executive Compensation Planning
- Business Owner and Succession Planning
- Document Review
- Coordination with Outside Professionals
- Private Client Website
- Secure e-Document Organizer
- Dedicated Concierge Coordinator

**Additional planning fee may apply*

All levels of service include the knowledge of our Investment Policy Committee consisting of 22 Team Members with over 18 average years of industry experience.