Services

Personal Insurance and Planning
- Life Insurance
- Disability Income Insurance Protection
- Long Term Care Insurance Protection
- Estate Planning
- Charitable Giving Strategies
- Gifting Programs

Business Insurance and Planning
- Employee Benefits
- Voluntary Employee Benefits
- Buy/Sell Funding
- Key Person Insurance
- Deferred Compensation
- Business Succession

Retirement Planning
- Individual Retirement Accounts (IRA)
- IRA Rollovers
- Roth & Traditional Investment Products
- 401(k), Roth 401(k), Profit Sharing, and Defined Benefit Plans
- 401(k) Rollovers
- Retirement Distribution Planning
- Estate Planning
- Deferred Income Annuities
- Fixed and Variable Annuities
- Managed Accounts
- Social Security Planning

Investments
- Mutual Funds
- Variable Annuities
- Securities Brokerage Services
- College Funding Strategies
- Fee Based Asset Allocation Programs

Duncan Financial Services, LLC
Insurance and Investments

Helping Individuals Achieve Financial Independence.

For more information on Duncan Financial Services, LLC, visit our website at:
www.financialguide.com/Jeffrey-Duncan

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Helping Individuals Achieve
Financial Independence

Duncan Financial Services, LLC
Insurance and Investments

Where Are You Now?
Where Do You Want To Be?

Your answers to these two questions form the foundation of a strategy for your financial security. That's why we begin each new client relationship by listening.

At Duncan Financial Services, LLC our mission is to always put our clients' needs first, listening carefully to their priorities and aspirations before making any recommendations. We help our clients to make informed, confident decisions based on a personalized, long-term financial strategy. Since your needs may evolve with time or with changes in your life, we stay in touch to ensure that you always own the right mix of investments and insurance protection.

Whether you're time horizon is five years or fifty, you can rely on Duncan Financial Services, LLC to guide you through your life's financial decisions.

The Duncan Difference

There are other financial services firms out there. Is there a difference? We think so. Importantly, the difference is not products. All licensed representatives offer insurance and investments.

We believe what sets our organization apart is service. Duncan Financial Services, LLC provides bend-over-backward service. We respond to your questions quickly and completely. Whenever possible, we work to anticipate your needs. For example, we conduct individual annual reviews to confirm that your strategy is on target and to reinforce the value of choices you have made. We work in concert with your CPA and attorney using a team approach.

Does service really matter? Consider this: most of our new clients are referred to us by our existing clients.

Duncan Values

The people of Duncan Financial Services, LLC are governed by the highest ethical standards. This is not because we are forced to, but because we require it of ourselves. Clients who entrust us with their confidence deserve nothing less.

Duncan Seminars

We believe an educated consumer is our best customer. With this in mind, Duncan Financial Services, LLC presents a range of educational seminars. Topics include planning for retirement, Social Security planning, protecting wealth and income, financing a college education, and more.

The Power of Experience

With 30 years of industry experience, Duncan Financial Services, LCC is positioned to lead our clients in developing and maintaining complete insurance and investment portfolios. Our range of expertise includes:

- Financial Analysis
- Estate Analysis
- Retirement Plans
- Investments
- Annuities
- Charitable Giving
- Business Insurance
- Executive Compensation
- Employee Benefits

As a registered representative of MML Investors Services, LLC, we offer mutual funds and can access a full range of investment products. In addition, through MML Insurance Agency, Inc., we can objectively search the marketplace for the best insurance plan to fit your individual needs.

So. . . Where Do You Want To Be?

When it comes to planning your future, a dream is a great starting point. At Duncan Financial Services, LLC, we'll work with you to begin the process of turning your dream into reality.

Jeffrey H. Duncan, CLU, CFBS, AEP, CLTC

"It's by listening that we get into the heart of your desires and discover what you truly want. Only then do we make recommendations to get you where you want to be."