

What does your path to
financial security look like?



Wealth Accumulation and
Retirement Income Strategies for Retirees

DS Duncan
Financial
Services, LLC
Insurance and Investments



Finding your way to financial security can seem overwhelming in today's complicated world. With so many responsibilities and priorities it's hard to know even where to begin.

There's so much to think about – making sure your family is taken care of, even if you can't be there for them; planning for a long, comfortable retirement; transitioning your business; leaving a legacy for your children and grandchildren.

That's where Jeff Duncan and Duncan Financial Services, LLC can help. Jeff has spent the past 30 years providing successful people just like you with financial services including insurance protection, investments, retirement planning, business succession planning and estate planning.

Whether you are looking toward a milestone event – like retirement – or looking for financial protection for your family or business, we'll give you our attention, insight and guidance to help you on a path toward financial security.



"We are better listeners than we are talkers. 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 help you get you to where you want to be."

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

How we're different

At Duncan Financial Services, LLC we recognize that your unique financial situation, goals, dreams and even fears for tomorrow require a strategy that fits you. That's why our number one objective is to get to know you as the individual you are.

We always do more listening than talking so that before any plans are made we can make sure we have a thorough understanding of your objectives for you, your family and your business. Once we

understand who you are and what you want, then we'll work together to address your desires and develop a strategy that will help get you on your way to financial security.

All licensed representatives can offer insurance and investments. We believe that it's our top quality service and our long-term relationships with our clients that set us apart from the other financial services firms.

When you call us, we'll answer. We'll respond quickly and thoroughly to your questions or concerns. When you need us, we'll be there for you and for your loved ones.

We'll grow with you; as your life changes, we'll make sure to contact you regularly to ensure your financial strategy continues to fit your life and your objectives.

Our knowledge and experience

Jeff Duncan and the team at Duncan Financial Services, LLC can offer you a full range of products to fit your specific financial planning needs, beginning with essential protection:

Personal Insurance and Planning

- Life Insurance
- Disability Income Insurance
- Long Term Care Insurance
- Estate Planning
- Charitable Giving Strategies

Retirement Planning

- Individual Retirement Accounts (IRA) (Roth and Traditional)
- IRA Rollovers
- 401(k), Roth 401(k), Profit Sharing and Defined Benefit Plans
- Retirement Distribution Planning
- Fixed and Variable Annuities
- Managed Accounts

Business Insurance and Planning

- Employee Benefits
- Voluntary Employee Benefits
- Buy-Sell Plan Funding
- Key Person Insurance
- Deferred Compensation Funding

Investments

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

At Duncan Financial Services, LLC, we are wholly dedicated to meeting the financial needs of families, professionals, business owners and retirees – helping people like you build and protect their wealth, and choose how they want to pass it on as their own legacy.



If you're ready to start down the path toward financial security, we're here to guide you.





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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