F. Keith Duncan, ChFC® AAMS®

LPL REGISTERED PRINCIPAL

SERVICES OFFERED

Personal Financial Planning

Private Investments
Stocks, Bonds & Mutual Funds
Fee-based Investment Management
Money Managers

Individual Retirement Plans
Traditional & Roth IRA's
Lump Sum /401(k) Rollovers

College Funding
529 Plans & Coverdell Savings Accounts

Estate Planning
Review current Trust and estate plans

Life Insurance Products
Key Man Protection
Buy-Sell Agreements
Long Term Care Insurance
Disability Insurance
Life Insurance
Permanent Insurance to fund
Irrevocable Trusts

Company Retirement Plans
Simple IRA's
SEP IRA's
401(k), 403(b) & Profit-Sharing Plans
Defined Benefit Plans

Non-Qualified Plans
Deferred Compensation
Executive Bonus & Split Dollar

OUR MISSION

No two investors share the same financial goals, nor should they share the same financial advice. Equally so, I believe that the partnership they share should be unique.

Our Clients deserve a partner who identifies all the varied aspects of their financial life and works diligently to uncover a host of possible solutions that help them address their aspirations. Our belief includes our clients' personal advisors, such as their attorney or accountant; together we can help ensure that all critical areas dovetail effectively with their overall investment and wealth management strategies. A well-rounded partnership is in our client' best interest.

My business was founded on a simple vision: to help clients pursue their financial goals through trusted advice and exceptional personal service. We provide comprehensive wealth management strategies for a select group of clients that include corporate executives, retirees, private business owners, individual investors, families, and foundations. We believe that by understanding our clients' financial goals and needs, we can combine the resources, knowledge and experience, to deliver personalized attention and advice.

PROFESSIONAL PROFILE

F. Keith Duncan is a LPL Registered Principal and LPL Financial Advisor with Duncan Investment Partners. Since 1994, Mr. Duncan offers a seasoned professional approach to assisting clients in determining goals, implementing plans and providing trusted advice.

A Washington DC native and graduate of Frostburg State University, his professional designations include the Chartered Financial Consultant® designation from the America College and the Accredited Asset Management Specialist® designation from the College for Financial Planning. He is FINRA Series 7, 24, 65, 66 and 31 held through LPL Financial along with Life and Health licensed.

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