WEALTH MANAGEMENT SERVICES

Duerr Financial Group

Our Approach

For over Twenty-Five Year, Duerr Financial Group has specialized in providing comprehensive wealth management services. Our team is committed to serving our clients as unique partners who require individualized solutions and comprehensive strategies, empowering them to make their own decision. Above all else, we value the relationships and trust that we build.

Financial Planning Services

We offer our clients a holistic financial planning approach to help them maintain overall financial health and accomplish multiple – and often competing – financial goals.

Investment Management Services

We understand your many investment needs and utilize timely and appropriate wealth management strategies to pursue both short and long-term goals. We also provide expert, customized and independent advice, putting your needs and best interests first.

Financial Planning Packages

ESSENTIAL PLAN **Get organized and set a course for your financial future**	**ADVANCED PLAN** A comprehensive approach to fully evaluate and prioritize your finances	**PREMIER PLAN** Take complete control of your financials and build your legacy
Meetings: 3 to 4	Meetings: 4 to 6	Meetings: 6 to 8
■ Portfolio Analysis ■ 401k Allocation Assistance ■ Risk Tolerance Assessment ■ Retirement Savings Planning ■ Cash Flow/Budget Analysis ■ Behavioral Finance Coaching ■ Goal Monitoring ■ Employee Benefits Planning ■ Personalized Recommendations ■ Detailed Action Plan	**Essential Services Plus:** ■ "What if" Scenarios ■ Multiple Goal Analysis ■ Education Planning ■ Risk and Insurance Analysis ■ Tax Planning ■ Roth Conversion Review ■ Basic estate planning ■ Third Party Professional Coordination	**Advanced Services Plus:** ■ Advanced Investment Solutions ■ Wealth Transfer Scenarios ■ Family Financial Education ■ Stock Option Analysis ■ Charitable Giving ■ Business or Entity Planning ■ Insurance Strategies ■ Advanced Estate Planning ■ Complex Trust Analysis
INITIAL PLAN: $1,500+ *3 Month Engagement*	*INITIAL PLAN: $2,500+* *6 Month Engagement*	INITIAL PLAN: $5,000+ 12 Month Engagement

Securities offered through LPL Financial. Member FINRA/SIPC. Investment advice offered through Private Advisor Group a registered investment advisor. Private Advisor Group and Duerr Financial Group are separate entities from LPL Financial. LPL Financial does not offer legal or tax advice.