Weekly Rep Call

11/18/2020

Duncan ADVISOR RESOURCES

Making It All Work **Together**

Click the button below to view the recording of last week's rep call.

Call Notes (Click on the red links to learn more):

Do YOU have a topic you would like discussed on the next call? Let us know! Contact your OSJ, or reply to this E-mail

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Duncan Financial Group's Success Story!

Alex Kline | Senior Vice President, Retirement Specialist
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Despite market disruptions, we have seen an upward trend in activity and opportunity in the retirement plan space through the relationships with clients and centers of influence.

With our expertise in sales and third party administration, Duncan Financial Group is working to offer better resources to help you incorporate retirement plans into your practice next year!

How was our $11.5 million RFP bid accepted? Collaboration with relationship managers, financial planners, marketing, and TPA value-add services! To hear how **you** could be the next success story, watch the full recording for details on how to get started.

Duncan Walsh Advisors

Duncan Walsh Advisors

David Duncan | Managing Partner and Chief Investment Officer
Thomas Walsh | Managing Partner and Chief Investment Officer

What has DWA done throughout the volatility of this year? Stayed the course with disciplined rebalancing, tactical shifts, regular investment policy committee meetings, and more! To get the full

story, watch the recording to hear all DWA portfolio updates!

What has the year's events done to the future of investing? A trend towards looser fiscal policy, uneven ratio of funding for benefits vs. filing for benefits, a call to be vigilant regarding impact of socialist governing on the markets, and more! For complete details, watch the recording to hear about economic outlooks!

Reference Materials:

- **DWA Portfolio Summaries**
- **DWA Performance Reports**

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