Dave Duncan and Tom Walsh have each been in the investment business for over 35 years. Each has made managing their respective clients' investment assets the core of his practice. They met at an industry group in the early 2000's and became affiliated within a branch of their broker dealer in 2005.

Over the years, each of them has been asked by their fellow advisors, many of whom are more generalist in nature, to partner with them and manage the investment portion of their client accounts. They recognized that Tom and Dave are more focused on investing, have a greater depth of knowledge and experience, and a flat-out passion for the investment of client assets.

In 2013, Tom and Dave decided to formalize these partnership arrangements with other advisors by forming Duncan Walsh Advisors (DWA).

David S. Duncan, CFP®
Managing Partner &
Executive Chairman

David Duncan is the Executive Chairman of Duncan Financial Group. Dave is a Certified Financial Planner® and has over 35 years of investment management experience. Although he has responsibility for all aspects of the company's growth, his main focus is private wealth management, which allows him to help his clients develop, monitor and achieve their financial goals.

David graduated from Point Park University in 1979 with a degree in Business Administration. He received the professional designation of Certified Financial Planner from the College for Financial Planning in 1986.

David has responsibility for the investment of over $250,000,000 of his client's funds.

Thomas J. Walsh, CFA
Managing Partner &
Chief Investment Officer

Thomas J. Walsh, CFA is the President of Walsh Asset Management, which he founded in 1999. He has over 35 years' experience in the investment business, focusing on portfolio management utilizing a proprietary model that includes both strategic and tactical asset allocation.

Tom graduated from Miami University in 1983 with a B.S, in Business / Finance, and the Broad School of Management at Michigan State University in 1991, where he received an MBA in Finance. He received the Chartered Financial Analyst (CFA) designation in 1989.

Tom has responsibility for the investment of over $150,000,000 of his client's funds.

Investment Policy Committee

The Duncan Financial Group Investment Policy Committee (IPC) is a diverse group of 18 Investment Advisor Representatives, with an average of 20 years industry experience. The group meets every Monday morning in person and via Zoom to share and discuss many topics in the investment world, including specific investment solutions and different market, economic and geopolitical scenarios. They act as a "think tank" by collaborating and peer-sharing fresh ideas and investment concepts.

The IPC creates a listing of mutual funds based on asset category, as well as asset category weightings, and makes them available to Duncan Walsh Advisors and the Duncan Advisor Resources branch.

The IPC is headed by Dave Duncan and Tom Walsh and has been meeting since 2002.

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