



May 6, 2010

**D3 Business Update:**

The Morton Arboretum event we hosted last weekend was very enjoyable. Thanks to all who attended. We plan on hosting an event there again next year. Plan to bring a friend next Spring in May, 2011.

**We opened up a Chicago branch on May 3<sup>rd</sup>.** The office is located in the Jewelers Building at 35 E. Wacker Drive (at Wabash), Suite 941, in downtown Chicago. We opened this office to better serve our Chicago-based clients, and market our services to both Chicago residents and commuters who work downtown. Peter and Adam now have the choice of a shorter commute to work, since they both live in the north side of the city. Our mailing address, telephone number and email addresses all remain the same.

We have begun the annual update of the financial plans for our Comprehensive and Retainer clients. Our goal is to obtain new information and incorporate any changes in your personal situation. We also review your tax return from a financial planning perspective, to determine if we should recommend any new action steps to help you achieve your financial goals. **We are including a questionnaire for you to fill out and return. You are also welcome to call us with your responses.** The back page of the questionnaire focuses on your insurance information. Please update this information, so that we can analyze if you have any risk gaps. For all our other clients, give us a call if you want your plan updated.

**As a reminder, we update your financial plan every year to re-evaluate how much risk you have in your financial life. This helps you determine how much risk you want to assume in your investment portfolio.**

Don just returned from the Financial Planning Association's Annual Retreat for senior planning professionals from around the country. Some new ideas that we're thinking about for our business include mind mapping software, structured notes, and absolute return mutual funds.

Peter enjoyed the Barron's Winner Circle Conference for the top independent investment advisors, which he attended last month. He learned that many of the investment specialists still believe in, and use, the traditional models of asset allocation to achieve the appropriate level of portfolio diversification, despite the market collapse in 2008. **He also learned that our Comprehensive service offering is priced below what most other advisors charge, given the level of services we provide.** Comparing us to the competition continues to reinforce that we provide high quality service at a value price.

Donald D. Duncan MBA CFA™ CPA CFP®  
Peter Marchese MBA CFA™  
Michael Meyers MBA CFP®

Becky Connery MSIA, Financial Planner  
Adam Glassberg, Financial Planner  
Patty Shipinski, Administration

5151 Mochel Drive, Suite 301, Downers Grove, IL 60515  
(630) 271-0033 Phone / (866) 385-8998 Fax  
[www.D3FinancialCounselors.com](http://www.D3FinancialCounselors.com)