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D3 Financial Counselors

When it comes to investing, nobody has all the answers. With so many variables in the global economy and ever-changing rules and regulations, effective wealth management is a continual learning process for both client and advisor. Nobody believes that more fervently than the professionals at D3 Financial Counselors (D3FC), an independent, Chicago-based firm specializing in helping individuals and families achieve their financial goals.

"Our philosophy is that a well-designed financial plan is the foundation that supports better financial choices and rational investment decisions," says Don Duncan, MBA, CFP®, CPA, CFA™, founder and president. "We educate our clients to ensure they understand the economic consequences of their financial decisions."

With more than 50 years of combined experience, the D3FC team has successfully guided clients through the best and worst of times by utilizing the most up-to-date information and technology to devise integrated strategies in a wide range of circumstances. The firm's institutional asset management experience includes managing billions of dollars in mutual funds, high-net-worth individual accounts and institutional funds.

Indeed, the firm has seen it all: soon-to-retire individuals unsure if they are financially prepared for retirement; business owners striving to maximize their after-tax wealth; entrepreneurs selling their businesses; affluent couples seeking ways to achieve their goals in the most tax-efficient manner; and much more.

D3 Financial Counselors represents a wide range of professional disciplines. The firm's designations include Certified Financial Planners®, Certified Public Accountant, Chartered Financial Analyst™ and a Certified Specialist in Estate Planning. Duncan has taught at Lewis University, DePaul University and Keller Graduate School. Working together, he and his colleagues pool their knowledge to devise financial plans that are designed to achieve each client's unique goals.

- **Topic-Specific Financial Planning Advice on an Hourly or Project Basis**
- **Comprehensive Family Office Services (Financial Planning, Portfolio Management, Risk Management, Taxes, etc.) on a Retainer or Percentage of Assets Basis**

"We're a one-stop shop for financial planning, tax strategies, risk analysis, portfolio management, estate planning and more," Duncan says. "Our comprehensive family office services are focused on generating value for our clients."

"We are value generators. Our philosophy is that a well designed financial plan is the foundation that supports better financial choices and rational investment decisions, thereby increasing value."

— Don Duncan, MBA, CFP®, CPA, CFA™, Founder & President

As a fiduciary investment advisor, D3FC adheres to the highest ethical standards in the financial industry. It is an independent, fee-only firm that sells no products, has no sales quotas and accepts no commissions. It is not affiliated with any other company and has no conflicts of interests. A third-party custodian holds clients' assets and reports to clients monthly. The firm strives to earn its clients' trust and prove its worth on a daily basis.

D3FC is highly respected among clients and industry peers. In 2009 and 2010, the firm was invited to attend the prestigious *Barron*'s Winners Circle Conference for the nation's top financial advisors. In November 2010, D3FC was featured in *Chicago* magazine as a Five Star Wealth Manager.

"The greatest intrinsic value I derive from this career is helping people achieve their dreams," Duncan says. "The second most rewarding component is the educational aspect. Our focus on education, experience and ethics is what truly sets us apart."

The Five Star Wealth Manager designation is based on a survey of consumers who rate the nominee according to nine criteria: customer service, integrity, knowledge/expertise, communication, value for fee charged, meeting of financial objectives, post sale service, quality of recommendations and overall satisfaction.

D3 Financial Counselors
Ethics, Education & Experience™

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