Investing in the Future

Comprehensive Financial Planning & Private Wealth Management

Muncaster Financial Group

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80 years combined providing

award-winning

FINANCIAL PLANNING SERVICES

BBB

Business Magazine Greenville

Columbia Business Monthly

CB CHARLESTON BUSINESS

Utilizing over 80 years of combined industry experience.

Based in Greenville, South Carolina, Muncaster Financial Group has been looking out for its clients' best interests since 2005. After ten years of experience as a financial advisor with a national and regional firm, Richard Muncaster recognized the Greenville community's desire for an independent, truly comprehensive financial advisory firm, leading him to establish Muncaster Financial Group, Inc.

At Muncaster Financial Group, we offer a full range of carefully tailored financial planning solutions, catering to high net worth individuals and families, successful business owners, and professionals seeking to reach personal goals, while helping to build and protect wealth. Our expertise and financial toolbelt includes 401k Planning, Defined Benefits, Profit Sharing, SIMPLE, SEP, Cash Balance, and more.

Today's financial world is changing at a record pace on a global level. We believe that between the myriad of products, companies, strategies, and complex tax laws, staying current and making prudent decisions can be challenging for the most seasoned and intelligent professionals. Navigating these waters successfully is difficult, and often requires a significant time commitment. Time is our greatest asset. We believe the ability to surround yourself with a team of knowledgeable professionals is of paramount importance to the long term success of your plan.

Family is in the heart of everything we do at Muncaster Financial Group. Our financial services are built on relationships and we always aim to treat clients like family as we prepare a solid plan for their future and the future of their children. The dynamic plans that we put into place are set to withstand all of life's changes and challenges, with our team guiding you every step of the way.

Our clients are our top priority, and their success is of utmost importance.

Comprehensive Financial Planning

Strategic Advice & Detailed Analysis’

Retirement Planning

Our approach to retirement planning goes beyond the basics. Whether you are in the planning stages or currently retired, we work closely with you to help develop and implement comprehensive and strategic solutions, based on your personal needs.

Business & Succession Planning

We can create a comprehensive road map for your business future, while preparing you with a clear understanding of the significant annual financial expenditures required and resources available to you.

Estate Planning

At Muncaster Financial Group, we aim to preserve, generate and transfer the wealth of clients to their future generations, allowing your assets to have a direct and lasting impact.

Strategic Tax Consulting

Whether you’re an individual or corporation, we can accommodate your tax consulting needs. Our team will develop a customized plan to help reduce tax liabilities, while maximizing potential opportunities tailored to your unique situation and adhering to changing tax laws.

Private Wealth Management

Secure Your Financial Future

At Muncaster Financial Group, our private wealth management services are centered on achieving client goals. As an independent firm, we are entirely client focused and do not adhere to corporate mandates. Our advisors bring experience, attention to detail, and access to a network of resources to develop customized and strategic solutions as we help you continue forward.

Our team will help you create a structured and individualized plan to achieve and exceed your financial goals. This allows you to enjoy the confidence and ease that comes with knowing a solid strategy is in place and a devoted team is working to benefit you.

MEET

Muncaster Financial Group's Team

Richard Muncaster, AIF®, LUTCF®

PRESIDENT

As Founder and Principal of Muncaster Financial Group, Richard aims to deliver personalized care and financial expertise as our clients pursue and achieve their unique financial goals. After spending 10 years as a financial advisor with a regional and a national firm, Richard established Muncaster Financial Group in 2005 after listening to his clients and recognizing the public's desire for a truly independent financial services firm.

Richard has extensive experience in the financial services industry working with high net worth individuals, business owners, and upper level management of successful corporations. He is a Registered Representative of Cambridge Investment Research, Inc. (Series 7, 6, 63), an Investment Advisor Representative of Cambridge Investment Research Advisors, Inc. (Series 65), LUTCF® (Life Underwriter Training Council Fellow), holds an LA&H (Life, Accident and Health) license, a P&C (Property and Casualty) license and numerous industry planning designations.

Thomas Simmons, CPA

PRIVATE WEALTH ADVISOR

Thomas serves as Private Wealth Advisor at Muncaster Financial Group and his highest priority is to deliver exceptional advice and value to our clients, diligently seeking to understand their personal circumstances, resources, needs, and goals. Thomas joined Muncaster Financial Group in 2017 after spending three years at Elliott Davis, the Greenville-based public accounting firm. He offers extensive client services such as portfolio management, tax planning, estate planning and philanthropic planning.

MEET

Muncaster Financial Group's Team

TRICIA SMITH, AIF®

RETIREMENT PLAN SPECIALIST

Tricia serves as our Retirement Plan Specialist, with the goal of creating effective retirement plans to protect clients' wealth. Her expertise in optimizing plan designs and implementing proactive solutions provides sound guidance. Tricia also brings more than twenty years of financial services and retirement plan experience to the Muncaster team.
Prior to joining Muncaster Financial Group, Tricia worked with 401(k) plans across an extensive and varied book of business.

Debbie Brown

ADMINISTRATIVE ASSOCIATE

Debbie fulfills the role of Office Manager and Client Services Representative, working alongside our financial executives as they deliver first-class customer service.

Her role is key in performing administrative duties for clients, while keeping the team on track with her attention to detail. With a Master's Degree in Public Administration from the University of South Carolina, Debbie brings over a decade of experience in the financial services industry to the Muncaster team. Her background and education make her an impressive and comprehensive resource, and her communication and adaptive skills allow her to navigate the complex nature of the wealth management and insurance business, always keeping our clients' welfare at heart.

MUNCASTER FINANCIAL GROUP

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