Investing in the Future

Comprehensive Financial Planning & Private Wealth Management

Muncaster Financial Group

Proud Recipient of the Better Business Bureau's

2022 Torch Award for Ethics

BBB

BBB

The BBB Torch Award is given to professionals with at least three years of business experience and a B rating or higher with the Better Business Bureau. The award is not based on investment performance.

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.

THE LEADER BEHIND THE

Muncaster Financial Group's Team

Richard Muncaster, 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. Following 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), Life Underwriter Training Council Fellow (LUTCF®), Accredited Investment Fiduciary (AIF®), holds a Life, Accident and Health (LA&H) license, a Property and Casualty (P&C) license, and numerous industry planning designations.

Passionate about the Upstate of South Carolina, Richard gives back to the Greenville community through his work on the board of Meals on Wheels of Greenville, by serving as a director of the Greenville Clemson Alumni Club, and by supporting many local charities annually including The Meyer Center For Special Children, Meals on Wheels, Law Enforcement Appreciation Day (LEAD), and the Cystic Fibrosis Kick Off For A Cure.

He is also a member of Greenville Country Club and the Greenville Chamber of Commerce, through which he completed Opportunity Greenville. Beyond serving his clients and community, Richard enjoys spending time with his wife, Sheri, his son, Mills, and step-daughter, Sophia, family, and friends, in addition to supporting Clemson University athletics, playing golf, snow skiing, and traveling.

Licenses and Degrees:

Accredited Investment Fiduciary® (AIF®)

Registered Representative of Cambridge Investment Research, Inc. (Series 7, 6, 63)

Investment Advisor Representative of Cambridge Investment Research Advisors, Inc. (Series 65)

Named Top 10 Advisor with Organic Growth among Transamerica Financial Advisors

Graduate of Clemson University – Bachelor of Science degree in Business Management with a concentration in Financial Management

LUTCF® (Life Underwriter Training Council Fellow)

LA&H (Life, Accident and Health) License

P&C (Property and Casualty) License

MEET

Muncaster Financial Group's Team

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.

A Greer native, Thomas is passionate about the Upstate and is committed to giving back to this community. He serves as Endowment Trustee for Meals on Wheels of Greenville, Inc. and is an active member of the Greenville Estate Planning Council. Thomas and his wife, Julia, reside in Downtown Greer, where they are members of Memorial United Methodist Church.

Licenses and Degrees:

Registered Representative of Cambridge Investment Research, Inc. (Series 7)

Investment Advisor Representative of Cambridge Investment Research Advisors, Inc. (Series 66)

Certified Public Accountant (SC #9123)

LA&H (Life, Accident and Health) Insurance License

Master of Professional Accountancy, with a Concentration in Taxation – Clemson University

Bachelor of Arts degree in Finance – Wofford College

Bachelor of Arts degree in Accounting – Wofford College

Three-year letterman wide receiver for the Wofford Terriers

Member of the Southern Conference Academic All Conference Team

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 30 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. Born in Asheville, North Carolina and raised in Greenville, South Carolina, she is a Carolina girl through and through. Outside of the office, Tricia enjoys reading, hiking, and spending time with friends and family. As a former competitive swimmer, Division I coach, and current gym enthusiast, she exudes dedication and determination to all of her endeavours, both personal and professional.

Licenses and Degrees:

Accredited Investment Fiduciary® (AIF®)

Series 7 Securities License, Series 66 Uniform Combines State Law Exam for Investment Advisor Representatives

Bachelor of Arts degree in Economics – Davidson College

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.

Debbie was born and raised in Walterboro, South Carolina. She and her husband, Jim, reside in Downtown Greenville, enjoying all of the amenities offered with the location, including easy access to the Swamp Rabbit Trail. Debbie enjoys being active and going to the beach with her two grandchildren.

MEET

Muncaster Financial Group's Team

Bryan Newton

PRIVATE WEALTH ADVISORY ASSOCIATE

As a Private Wealth Associate, Bryan supports the lead advisors with designing comprehensive financial plans for individuals and families, participating in client meetings, performing client services, and regularly reviewing clients' portfolios.

Bryan has been in the financial/investment industry since 2014. Bryan started his career as an Agent with Mutual of Omaha and a Financial Services Representative with New York Life. During this time, he worked with clients and their families on their insurance and retirement income planning needs. Starting in 2017, Bryan transitioned to the commercial real estate industry with RealtyLink where he was an Investor Relations Manager and Property Manager. As an Investor Relations Manager, he worked closely with individuals and institutions across the country that were seeking commercial real estate investment opportunities that matched their investment criteria.

Bryan graduated from Lander University in 2010 where he majored in Business Administration (Accounting Emphasis) and was a member of the Men's Golf Team. He met his wife, Rachel, at Lander, and they now live in the Five Forks area of Simpsonville, SC, with their two sons, Wells and Wyatt. Bryan enjoys playing competitive golf, swimming, and coaching the Masters Swim program at the Caine Halter Family YMCA.

Licenses and Degrees:

Registered Representative of Cambridge Investment Research, Inc. (Series 7)

Investment Advisor Representative of Cambridge Investment Research Advisors, Inc. (Series 66)

MUNCASTER FINANCIAL GROUP

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