

THRIVING IN THE SUMMER SUN

Muncaster Financial Group has experienced continued growth in both our comprehensive planning and retirement plan services. We continue to pursue opportunities that allow us to better serve you and our community. In this edition, we are pleased to share some of the key activities and insights that have shaped our summer.

Nominated for Best in Business

We're excited to share that Muncaster Financial Group has been nominated in two prestigious categories for SC Best in Business 2024 – Best Financial Brokerage Firm and Best Wealth Management Firm.

This recognition reflects our team's dedication to delivering exceptional service. Thank you to our clients and community for your ongoing support as we strive for excellence everyday.

Please take two minutes to vote for Muncaster Financial Group!

Link below and select "Professional Services" at the top and scroll to Best Financial Brokerage Firm and Best Wealth Management Firm to vote for MFG. You must vote in at least five categories to submit your vote.

[CLICK HERE TO VOTE](#)



Tricia Recognized as SC Women in Business Recipient



Congratulations to Tricia Smith, our Retirement Plan Specialist, for being honored as one of South Carolina's Top Women in Business!

Utilizing over 30 years of experience in the financial industry, Tricia provides tremendous value to her clients and colleagues at MFG. Her dedication to problem-solving and delivering exemplary service is unmatched. As a Retirement Plan Specialist, Tricia expertly guides plan sponsors and participants in optimizing their retirement plans, always prioritizing client needs.

Please join us in congratulating Tricia on this accomplishment. We are incredibly proud of her achievements and grateful to have her as a vital part of our team.

SC Home Builders Association – Our Valued Partner



We continue to strengthen our relationship with the Homebuilder's Association of South Carolina through tailored financial solutions and industry-specific insights. Our goal is to empower HBA members with the support needed to achieve their financial goals and to sustain long-term financial success.

This ongoing partnership underscores our shared commitment to supporting the growth and prosperity of South Carolina's homebuilding industry.



The Blueprint 401(k) PEP

The Blueprint 401(k) PEP (Pooled-Employer Plan) is a turnkey solution for businesses that want to outsource the vast majority of their 401(k) administration with customization and scaled pricing.

Leave your retirement plan to the professionals, so you can stay focused on what you do best – running your business.

We encourage you to visit our website to learn more and schedule a demo.



THE BLUEPRINT 401(K)

[CLICK HERE TO SCHEDULE A DEMO](#)

HBA Block Party

It's always a great time with the HBA of Greenville! Our team enjoyed a night out for a Greenville Drive game to network and enjoy an awesome night of baseball.

Our collaboration with the Homebuilder Association goes beyond the Greenville chapter to the state level. Our goal is to provide their members with top notch financial services and advice to guide business owners and employees alike to a better financial future.



Summer Happenings

Check out what the MFG Team was up to this summer!



An Inside Look

This summer, we had the pleasure of hosting Cullen Jorgenson as a part of our Summer Shadowship Program.

A rising senior at Davidson College majoring in Economics, Cullen had the opportunity to gain firsthand experience alongside the experts at MFG.

During his time in the office, our team provided him with valuable insights into the financial planning industry offering him a unique perspective as a premier boutique firm.



[Click Here to Check Out MFG Insights](#)

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