



Muncaster Financial Group

# WINTER NEWSLETTER

## 21 Years of Muncaster Financial



This year marks 21 years of Muncaster Financial Group, and it's a moment filled with gratitude. Thank you for the trust you and your families have placed in us over the years. Your confidence in our guidance is the foundation of everything we do.

We are deeply grateful for the relationships we've built and for the privilege of being part of your financial journeys.

## Client Spotlight - Dr. Duncan

"Thomas Simmons is an extremely talented financial advisor, but more importantly, he is a wonderful person & is extremely trustworthy. I cannot say enough good things about Thomas. He is kind, patient, diligent, hardworking, & incredibly bright. I thoroughly enjoy working with him, & I know that as long as I have Thomas advising me, my financial future is in excellent hands!"



**Dr. Mary Frances Duncan**  
Owner, Founder, & CEO



This testimonial is based upon an individual client experience and may not be representative of the experience of other customers and should not be considered a guarantee or indication of future performance or success.

## Meyer Center Holiday Luncheon



The Muncaster Financial team had a wonderful time supporting the Meyer Center for Special Children at their annual holiday luncheon. We were grateful to be joined by so many valued friends and clients as we came together for an impactful event that raised over \$455,000 in support of the organization. It is truly an honor to support the Meyer Center and the incredible work they do to serve children and families throughout the Greenville community.



## Retirement Plan Participant Education

We love participant education! This January, we met with Infinity Marketing, one of our valued 401(k) plan clients, to host an educational session focused on their plan and available options. We always enjoy connecting with our clients and their participants as we support their journeys toward retirement.



## Office Update

Thank you to everyone who has supported us as we continue to recover from the impact of Hurricane Helene.



We remain fully operational and are currently working from our temporary office location at 502 Green Avenue, Greenville, SC.

We anticipate returning to our office at 9 Whitsett Street this spring.



All meeting locations will be confirmed individually via email. We sincerely appreciate your continued support and understanding.