



Muncaster Financial Group

SPRING NEWSLETTER

Cambridge Premier Club

We're proud to share that Richard has been named a 2026 Cambridge Premier Club Qualifier by Cambridge Investment Research.

The Premier Club recognition honors financial professionals who exemplify exceptional leadership and a commitment to serving their clients, while consistently reflecting Cambridge's core values of integrity, commitment, flexibility, and kindness.

This achievement reflects Richard's dedication to his clients and commitment to excellence. Please join us in congratulating him on this honor.



The 2026 Premier Club Award is based on personal and/or office production benchmarks established by Cambridge. This award is not based on investment performance or indicative of client experience.



Walk to Save Lives

This April, Muncaster Financial was proud to support the American Heart Association at their annual Heart Walk. The event raised over \$225,000 to fund research, provide training in life-saving CPR, and advance medical breakthroughs in heart health. Team Muncaster was honored to be a part of such an impactful event.



Client Spotlight - Anne Marchant

"I couldn't be more impressed with the comprehensive financial plan Muncaster Financial Group created for me. Their team took the time to understand my unique goals and crafted a strategy that addresses both my short-term and long-term needs. With their expertise and personalized approach, I feel confident in my financial future."

Anne Marchant
Owner & Realtor



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. [Click here to view all our Google Reviews.](#)



Lunch & Learn

It's always a pleasure to spend time with our friends at Southern First Bank. This spring, they hosted the MFG and Azalea Capital teams for a lunch and learn filled with great conversation and valuable insights.



Meyer Center Kids Classic

Thomas and Bryan had a great day on the course with our clients and friends at Infinity Marketing while supporting the Meyer Center for Special Children.

Congratulations to Bryan and Nelson Dickson for winning their flight at the Country Club of Spartanburg.

The Kids Classic raised over \$1,000,000 for the Meyer Center, supporting their mission to enrich the lives of children with disabilities so they can reach their maximum potential.



Thrive 2026

This May, Richard and Sheri attended Thrive 2026 in Sarasota, Florida, hosted by TAG Advisors.

TAG's Thrive 2026 conference is designed for financial professionals, wealth managers, and independent advisors. It serves as a major industry gathering for continuing education and strategic growth planning.

Better Business Bureau

Muncaster Financial was proud to sponsor the Better Business Bureau's annual golf tournament this spring and spend the day connecting with businesses from across the Upstate.

We are always excited to support our local business community and build new relationships!



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 June.

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

