



# Dream Big



# *Financial Peace of Mind*

Financial goals are about more than money. Ultimately, your financial goals are about your freedom — so dream big. Careful financial management gives you the power to make your life simpler, more fulfilling, and more secure for you and your family.

Navigating the increasingly complex world of personal finance is a challenge for anyone. Isn't it wise to seek the help of those who've dedicated their careers to understanding not only the complexities of financial planning, but your particular situation in life and the goals you hope to achieve?

Jody Duncan is not just a financial planner – she is your financial partner. By building long-term, caring relationships and applying her professional skills, Jody can help you realize your financial goals. She is dedicated to helping you make smart decisions about your money and your financial freedom.

# ***Objective Planning and Advice***

Jody specializes in retirement and estate planning, investment selection and portfolio management. She is also well versed in all aspects of general financial planning and personal finance. In practice since 1997, Jody works with clients who wish to establish a long-term professional advisory relationship.

- **Investing for a more comfortable retirement**
- **Preserving wealth through an intelligent tax planning approach**
- **Devising education strategies for the future of your children**
- **Buffering your financial exposure to emergencies or unexpected events**
- **Consolidating your assets through a unified management program**
- **Optimizing your legacy with smart and timely estate planning**
- **Providing advice for all the ages and stages of your life**





## *A Special Connection with Women*

Change is the only certainty in life. At some point on your journey, you'll need the help of a professional financial guide. Women may experience a variety of transitions in their lives. In addition, several unique factors affect women's financial security.

- **Because women, on average, live longer than men their retirement resources have to last longer.**
- **A woman's weekly take-home pay is still on average less than that of a male counterpart.**
- **Women often leave the work force to raise a family or care for aging parents.**

After working with many women through times of transition, Jody has discovered that this is deeply rewarding work. If you are experiencing an emotional loss, it is normal to feel overwhelmed with new responsibilities. Jody has developed a process that identifies the immediate areas of concern and necessity. She understands that the healing process takes time and will guide you to make decisions only when you are ready, discouraging any large financial decisions in the early stages of a life transition.

Wherever you are on life's path, Jody will partner with and educate you about financial matters. Working together, you'll create a financial plan that will provide comfort today and a secure tomorrow.

# Jody Duncan, CFP®

## *The Caring Advisor*

The first thing you notice about Jody is her quiet concentration. She listens, really listens, to your needs and wants. Next, you see her analytical mind go to work as she helps you fashion goals, priorities and plans. Then, you realize her thorough explanations and disciplined implementation have turned chaos into order, ideas into reality.

Jody's background is in economics and engineering. Her innate capacity to understand finances and analysis coupled with her genuine compassion and regard for others give her a special ability to help her clients achieve their goals.

When she's not working, Jody focuses on her family and friends. She can often be found with her daughter, husband and dog, taking-in the scenery during long walks around Portland's beautiful parks.



# **Jody Duncan, CFP®**

## *The Caring Advisor*

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*Helping People  
Make Wise Decisions  
About Their Money  
and Their Lives*



Financial planning and investment advisory services offered through The H Group, Inc., a full service, fee-based Wealth Management firm founded in 1990 and registered with the SEC as a Registered Investment Advisor firm.

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