FINANCIAL PLANNING, RETIREMENT PLANNING, AND INVESTMENT MANAGEMENT SERVICES

Fee-only financial advisor serving Hockessin, Delaware & the surrounding areas

OUR MISSION ... OUR PASSION

At Mallard Advisors, our mission is to serve as your **trusted** advisor, helping you make informed decisions that strongly impact your financial and personal life. Our financial planning, retirement planning, and investment management solutions suit those looking for an on-going **partnership** with a small independent firm that maintains a personal, open-door relationship with our clients. Everyone deserves an unbiased (**fee-only, fiduciary**) advisor who has high standards and takes a straightforward, **collaborative** approach.

We are passionate about delivering actionable and understandable solutions that are powered by highly **technical and detailed** illustrations - and backed by our experience and wisdom.

Non-CPA
Associate Member of
AICPA

TAX-FOCUSED

Real financial planning must consider and integrate taxes since the income tax bill is the largest recurring expense our clients face. We offer detailed, multi-year tax planning and income tax preparation designed to identify tax savings strategies.

FEE-ONLY, FIDUCIARY

Since day one (18+ years ago), we chose to work as fee-only, fiduciary advisors. This means we never have and never will sell financial products or receive commissions, and the best interests of our clients always comes first. We are trusted advisors, not salespeople.

HOLISTIC ADVICE

Financial planning needs to integrate all aspects of your financial life: taxes, cash-flow, savings, investments, and financial security. We collaboratively craft your recommendations only after we understand you – your goals, dreams, and financial life.

02:27

OUR TEAM

Bill Starnes, CFP, MTAX

Sherry Jamieson

Financial Paraplanner

Christina Crawford

Office Manager

Mitch Fryling, CFP, MS

Financial Advisor

MEET THE TEAM

OUR SERVICES

VIEW A ONE-PAGE SUMMARY OF OUR SERVICE TIERS AND COSTS

FINANCIAL PLANNING

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Stand-alone financial plans are crafted for clients looking for individually tailored financial solutions to their most pressing financial concerns. Typically the plan emphasizes sophisticated retirement planning, investment consulting, and tax planning advice. It also addresses other areas including Social Security collection strategies, pension options evaluation, insurance needs analysis, and other planning as desired.

implementation assistance covering all aspects of their financial lives with the goal of establishing a long-term partnership with a trusted advisor. It is through this type of relationship that our clients receive the greatest service and cost benefits. Tax-preparation is included with this service (if desired).

INVESTMENT MANAGEMENT

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The Investment Management program provides on-going discretionary investment oversight including investment selection, trading, monitoring, and performance reporting. It is preferred by clients looking solely for investment assistance.

TAX PREPARATION

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Our knowledge of our clients' income, investments, and personal situation puts us in an ideal position to prepare their personal tax returns, find savings, and side-step errors.

OUR CLIENTS

Our clients are successful and have achieved this success by building professional businesses, living beneath their means, or generating high incomes. They recognize their financial situation has grown complex, and know they must get advice from someone who isn't selling financial or insurance products with questions such as:

- Can we retire and still maintain our standard of living for the rest of our lives?
- When should I start taking Social Security?
- Can you give me a second opinion on my portfolio?
- How much should I be saving or spending?

FAMILIES

~ College Planning

BUSINESS OWNERS

~ Tax Planning

PROFESSIONALS

~ Retirement Planning

RETIREES

~ Investment Management

FREQUENTLY ASKED QUESTIONS

How are you compensated?

Where does an advisor provide the most value?

What is your investment philosophy?

Are you a Fiduciary?

MORE FAQ'S

FREE AUDIO RECORDING

Receive your free audio recording titled ***Investment Success***. Just click the link below to instantly stream the audio.

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Hockessin, DE 19707 | Map
(302) 239-1654

Complimentary get acquainted meeting

To Check Firm or Individual Backgrounds please go to the SEC's website at www.adviserinfo.sec.gov.

Disclaimer