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We all have different financial goals. But reaching them often requires the same thing – a close relationship with a knowledgeable, trusted financial advisor. **Sycamore Financial Group** is a professionally operated investment management and financial planning company. Our purpose is to strategically guard and grow our clients and partners assets. **Sycamore Financial Group** has three ongoing primary goals for our clients portfolios: Solid returns, reduced volatility and tax efficiency. Investors and their advisors have successionally remained loyal with us over the years, due to the quality service and measurable investment results. By understanding all of your financial goals and objectives, we'll work together to build a customized plan that helps meet your specific investing, retirement planning or college saving strategies.

Hilltop Securities

- View updated values & holdings of your portfolio(s).
- View, download or print historic activity.
- View, download or print statements or tax info.

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Folio Investments

- View updated values & holdings of your portfolio(s).
- View, download or print historic activity.
- View, download or print statements or tax info.

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SFG Access Vault

- View documents residing in your vault including quarterly performance reports and commentary.
- View, download or print historic activity.

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ABOUT THE COMPANY

At **Sycamore Financial Group**, we use repeatable and sustainable processes and systems to support clients' investment needs. This client centered approach focuses on consistently producing the highest quality results in order to exceed your expectations. We concentrate our efforts and expertise to help assure the best possible results from your portfolio.

RECENT BLOG ENTRIES

- › [Maximizing your 401\(k\) Match](#)

- › [January 2018 Performance Update](#)

- › [The Low Down on Retirement Accounts](#)

- › [The Market is Volatile – Is this Normal?](#)

MUTUAL FUNDS RATING



Sycamore Growth & Income Composite was rated four stars against 418 Large Growth Value category funds overall for the period ending 3/31/2018

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