



WELCOME TO DALE BUCKNER, INC

We are dedicated to providing investment management and strategic wealth planning. Simply put, we strive to be our client's trusted advisor. As a financial advisory firm, our primary focus is to provide unbiased opinions that are designed to achieve long term investment results.

OUR TEAM



DALE E. BUCKNER, MBA,
CFP®, AIF®
President



BRETT HANSEN MBA, CFP®



SERVICES

PORTFOLIO DESIGN

We use Modern Portfolio Theory to help us develop an appropriate allocation strategy. All major classes of investments are considered including but not limited to cash, stocks, fixed income, real estate, non-correlated assets, and alternative asset classes. Stocks are further divided into domestic and foreign stocks, growth and value stocks, large cap, mid cap, and small cap stocks. Fixed income is further divided into government bonds, municipal bonds, mortgages, convertible bonds, hi yield bonds, short duration and long duration fixed income investments, and preferred stocks. Real Estate is further divided into domestic and foreign, income and growth real estate, and debt or ownership categories.



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We hope to act as your guide to implement, manage, and monitor performance to implement, manage, and monitor performance. Our greatest challenge can be managing investor expectations and behavior during both good times and bad.

Tax consideration can often be a deciding factor for any plan. We want you to pay the lowest legal tax, defer your tax if appropriate, and hopefully reduce the tax obligation for you and your heirs. We practice Legacy Planning where we not only help you pass your wealth on to your heirs but also your values.

ABOUT US

We are dedicated to providing investment management and strategic wealth planning that is right for you. Simply put, we strive to be our client's trusted advisor.



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COMPANY ADDRESS

301 S Polk STE 420
Amarillo, TX 79101

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