



*personalized investment insight & strategies*

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WELCOME TO GRACE



insights they need to invest with confidence. We understand that now more than ever, investors are looking for real solutions to their investment management needs. We are an independent advisory firm offering a personal alternative to large investment banks, brokerage firms and insurance companies.

Over time, we collaborate with our clients to develop and implement dynamic strategies that cultivate wealth and financial well-being. Our independence frees us to navigate the complex financial landscape and tailor solutions to your needs today, tomorrow and for years to come.

LIFE IS A JOURNEY WITH TOO MANY CHALLENGES TO FACE  
ALONE

*With GCM, you have a meticulous specialist guiding you along the way. This allows you to focus on life's other important things, like your family, career, leisure time and even a good night's sleep.*

*Our clients say we treat them like family...  
and we like the sound of that.*

## OUR CORE VALUES

*These are the principles that guide us*

## *People*

This is the most important aspect of our business; from our employees, to our vendors and fund managers, and above all, our clients.

## *Courage*

We have the resolve to pursue excellence, holding steady when the tides change, while maintaining the ability to change course when necessary.

## *Humility*

We are lifetime learners, disciplined, willing and able to learn in the best interest of our clients.

## *Best Practices*

We continually strive for excellence in ourselves, our advice, and our service to clients.

## OUR INDEPENDENCE BENEFITS OUR CLIENTS

*Grace is the difference*

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### Investments

There are no exclusive relationships with investment banks, brokerages, mutual fund companies, insurance companies, or any other investment firms. We offer a truly unbiased consultative approach.

GCM is not obligated to endorse specific investment research or financial products. Instead, our customized solutions are derived from independent sources and third-party analysis with a focus on quality and accuracy. Our advice is driven *solely* by client needs and circumstances.

### and Expenses

Without layers of middle management and redundant staff to support, we are able to provide consulting services at competitive prices.

There is no one-size-fits-all approach to financial management. GCM conducts original research and expertly applies it to our clients' unique needs. You can rest assured that any advice given is based on your personal situation.



### Customized Solutions

We filter comprehensive economic and financial market data and employ quantitative and qualitative analysis. This, combined with

### Risk Management

Risk management guides our entire investment process. By combining leading risk technologies with integrated global strategies, we can focus on delivering

### Consistent and Repeatable Investment Processes

Rather than chasing short-term gains, we work hard to meet and exceed real, agreed-upon, long-term benchmarks. This requires

### Service, Communication and Collaboration

Success is more than just the bottom line; it's about the confidence we instill in our clients. Of utmost importance is





## OUR ASSOCIATES



*George Duff*

George began his consulting career in 1996, developing a diverse client base ranging from professional athletes to business owners. Prior to co-founding Duff & Boynton, where assets doubled during his tenure, George successfully rose to Vice President of Investments at A.G. Edwards & Sons. Before becoming a financial advisor...



*Jack Dorman*

Jack has enjoyed multiple careers, each challenging and fulfilling, from large technology companies (Texas Instruments, Intel, Tandem) to smaller start-up companies. He has been friends with George Duff for many years and recently joined George at Grace Capital Management as an investment advisor and technologist. Jack's care for...



## *David Ash*

David Ash attended the University of Texas on a football scholarship and wound up playing quarterback for two years, posting an undefeated record in bowl games before injuries sidelined him. The University graciously continued to honor his scholarship allowing him to complete his undergraduate degree in Corporate Communications as well as his Masters in Finance from the McCombs School of Business. While finishing up graduate school he served as the youth pastor at Bannockburn in Dripping Springs...

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## *Ben Meadows*

Ben Meadows graduated from Texas A&M University where he co-founded chapters of a men's fraternity, Keeping Under Christ, and a student organization, I Am Second. Under his leadership as president, they became the two most successful chapters in the nation. Before starting his career in business, Ben traveled extensively to collect data for various wildlife conservation initiatives...

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## *Kynda Olson*

## *Amy Duff*

Kynda, a native Texan, has worked in financial planning for over a decade.

She has served Grace Capital Management since 2009. Kynda is happily married to Chris, a local high school teacher and football coach.

Together, they have a son. While attending the University of North Texas, Kynda started her own...

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An academic scholarship brought Amy all the way from Alabama to the University of Texas at Austin. There she earned both a Bachelors and a Masters in Mathematics Education. Upon graduation, she married George and began teaching school. Over the years, she has taught at various levels, in both public and private schools...

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**CONTACT US**

## *Our Address*

🏠 11651 Jollyville Rd., #300  
Austin, TX 78759

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