

DA VINCI FINANCIAL DESIGNS

A FINANCIAL LIFE BY DESIGN




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“In the grand scheme of things, money’s not that important. It’s significant only to the extent it allows you to enjoy what is important to you.”

- Bill Bachrach, CSP, CPAE, Author of Values-Based Financial Planning

About DaVinci Financial Designs®

DaVinci Financial Designs® is an independent financial planning and Registered Investment Advisory (RIA) firm conceived and created, to serve your needs — first and foremost. We begin by understanding you, and what’s important to you. Our goal is to help you create A Financial Life By Design®. Our planning process includes the following areas, and more, tailored to your unique circumstances.



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"Whats In A Number"

"Who We Are"

Our name and the Vitruvian Man imagery within our logo, embody the comprehensive and integrated nature of our work. They remind us that in building financial designs, our central focus is on you. Then, blending both art and science, our work couples professional advice with leading-edge

products, encompassing all the different financial aspects of your life. Each element of the design must be in harmony with the whole, and each part must work in concert with the other. Efficiently. By design.

DaVinci Financial Designs® is strengthened by the tools and support we receive through LPL Financial, the largest independent broker/dealer in the nation*. LPL Financial's strength is exceeded only by their independence. This means that, at DaVinci, we have access to a broad and robust range of offerings, but we remain free to recommend only those products and services which best address our clients' needs. This commitment to independence helps to preserve the integrity and objectivity of our financial planning advice. It allows us, acting as fiduciaries, to place your needs above product, and even above brand. We're confident that you will be pleased with the quality and scope of the service and advice you will receive from us.

We'd like to schedule time to meet with you, here at DaVinci, to explore how we might be of service to you, your family, or your business. Please contact us, at 803-741-0134 or toll free 855-821-8844, we look forward to assisting you in creating A Financial Life by Design®.

*As reported by Financial Planning Magazine, June 1996-2013 based on total revenues.

Our Advisors

Jim Agostini, CFP®, ChFC®

Jeb Zoller, CFP®

Patrick Burgess, CFP®

Stephen Simmons

Brad Wilson, MBA

Woody Trant

"What We Do"

"Life in a Box"

In the News

2019 1st Quarter: [DaVinci Financial Newsletter](#)

Fall 2018: [DaVinci Financial Newsletter](#)

June 2018: [DaVinci Financial Newsletter](#)

2018 1st Quarter: [DaVinci Financial Newsletter](#)

January 2018: [DaVinci Financial Newsletter](#)

July 2017: [DaVinci Financial Newsletter](#)

May 2017: [DaVinci Financial Newsletter](#)

April 2017: [DaVinci Financial Newsletter](#)

January 2017: [DaVinci Financial Newsletter](#)

Articles

[Saving Through Your Retirement Plan at Work](#)

[Feds Great Unwind and Your Portfolio](#)

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[Buckets of Money: A Retirement Income Strategy](#)

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