

McCormick Financial - Myles McCormick, CFP®

## Working With You to Pursue Your Financial Goals

209 West Central Street, Suite 208

Natick, MA 01760

Phone: (508) 720-0123

[mylesmccormick@swsfinancial.com](mailto:mylesmccormick@swsfinancial.com) (<mailto:mylesmccormick@swsfinancial.com>)

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I am an experienced financial advisor who has provided portfolio guidance and brokerage services to individuals for over 21 years. I work with my clients to understand their individual investment, insurance, and financial planning needs. I take the time to educate my clients on the choices they need to make, the alternatives available to them, and the individualized portfolios that are best suited to their risk tolerance and goals.

As an independent and experienced professional, I offer mutual funds and insurance products to individuals from a wide range of companies. Since I do not represent any one company exclusively, my research and recommendations are not limited to a short list of company- approved fund choices or a "one-size-fits-all" model portfolio.

I have clients with whom I have worked with for more than a decade. My clients value the relationship that we establish and my attentiveness to their needs. They have remained with me as I moved from positions in a large firm to my own independent practice, where I have more choices and greater flexibility to offer them as I work with their accounts.

If you are looking for someone to work with you to develop a plan for your financial goals, I will provide you with a complementary analysis of your current portfolio.

Thank you,

Myles McCormick, CFP®

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1201 Elm Street, Suite 3500, Dallas, TX 75270 (214) 859-1800



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