

**INDEPENDENT  
INVESTMENT ADVISORY**



**EXCEPTIONAL  
INVESTMENT SERVICES**

**OVERVIEW**

Merit Investment Management is a Registered Investment Advisor (RIA) based in West Chester, PA. Scott McGraw founded the firm in 2009 and serves as Merit's Chief Investment Officer. Merit is an independent Registered Investment Advisor (RIA) and a Fiduciary serving only its clients' best interests. Merit works with individual & institutional clients to build customized investment solutions to achieve their investment objectives. Merit offers its clients a high level of service, low fees and great value.



**INVESTMENT ADVISORY**

Merit helps clients define & implement an investment strategy to build long term wealth. Merit helps clients assess their current financial situation and develop a comprehensive Financial Plan. The key components of the Financial Plan include the Financial Snapshot, the Interactive Financial Plan and the resulting Investment Strategy for each client. Merit conducts client discussions & financial analysis to establish each client's investment strategy. Merit establishes a proactive communication plan & review process based on client preferences to keep clients engaged and informed to achieve investment success.



**RETIREMENT PLANNING**

Merit helps clients develop a comprehensive financial plan & investment strategy for retirement. Merit helps clients evaluate their options and focuses on improving three key items: 1) expanding the available investment options, 2) lowering overall costs and 3) increasing the availability of additional investment services. These services include retirement planning, estate planning, budgeting, debt management, tax assistance, evaluating Medicare options, Social Security options, insurance analysis & other services.



**CONTACT MERIT**

Merit offers a fee consultation to discuss your financial situation, objectives and options. Merit can manage a single investment account or a client's entire investment portfolio. Investors can call Merit, email Merit or schedule a meeting online via Calendly.

**Merit Investment Management**

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