

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 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 a Financial Snapshot, the Client Model and the resulting Investment Strategy for each client. Merit conducts client discussions & financial analysis to establish each client's investment strategy and a communication plan based on client preferences.



RETIREMENT PLANNING

Merit helps clients develop a comprehensive financial plan & investment strategy for their 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, education planning, estate planning, budgeting, debt management, tax assistance, evaluating Medicare options, Social Security options, insurance analysis & other services.



GLOBAL BLUE CHIP DIVIDEND STRATEGY

Merit offers its Global Blue Chip Dividend Strategy for institutional & individual investors

Investment Philosophy

Employ a comprehensive investment approach integrating macroeconomic, industry & company analysis
Generate superior returns through fundamental company research & active portfolio management

Investment Strategy

Invest in blue chip industry leading companies with strong dividend yields offering compelling returns
Generate strong dividend income to improve total return, reduce risk & enable continuous reinvestment

Investment Portfolio

Diversified portfolio of market leaders with strong dividend income generation from all market sectors
Active portfolio management process to allocate capital to maximize returns and reduce risk



CONTACT MERIT

Merit offers a fee consultation to discuss your financial situation, investment 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.

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