

**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 achieve their goals through its three services: financial planning, investment management & financial advisory. Merit helps clients assess their current financial situation and develop a comprehensive Interactive Financial Plan to manage all aspects of their financial life. Merit develops a customized Investment Strategy for each client. Merit conducts client discussions to establish each client's investment strategy as well as 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) adding additional investment services. Merit's financial advisory services include retirement planning, education planning, estate planning, budgeting, debt management, tax assistance, evaluating Medicare options, Social Security options, insurance analysis & advising on all aspects of a client's financial decisions.



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



CONTACT MERIT

Merit offers complimentary consultations to discuss your financial situation, goals and options.
Merit can manage a single client investment account or a client's entire investment portfolio.
Investors are welcome to call or email to discuss their objectives and Merit's financial advisory services.

Merit Investment Management

Farmers & Mechanics Building
2 W Market Street, Suite 100
West Chester, PA 19382
484.473.8413 office

research@meritinvestmentmanagement.com
www.meritinvestmentmanagement.com