MCF
WEALTH MANAGEMENT &
INSTITUTIONAL SERVICES

MCF Announces Duncan, Smith & Stilz, PSC to Join the MCF Team

Kentucky RIA with $2B AUM Accelerates Growth with Expansion of Tax & Accounting Services

December 5, 2022

LEXINGTON, KY. – MCF Advisors LLC (MCF) announced today that Lexington-based Duncan, Smith & Stilz (DSS) Certified Public Accounting firm will join the MCF team on January 1, 2023. This furthers MCF's depth and ability to offer a wide range of financial expertise to its clients. MCF's Tax & Accounting service offering has substantially grown since it began offering these services two years ago. MCF offers clients added value through the Financial Advisor also leading the client's tax needs. This allows for real-time financial decisions that considers tax implications.

"We believe we can best serve our clients through a holistic view of their entire financial life. Of course, this includes financial planning, investments, and estate planning; however, managing all of these aspects through the complex and ever-changing lens of tax is imperative," says Natalie Schuler, Manager of Tax & Accounting Services at MCF.

Established in 1978, DSS will bring over 44 years of knowledge and experience to the team, which will immediately benefit MCF clients. Joining the MCF team from DSS includes Stewart Smith, CPA; Jim Stilz, CPA; Andy Smith, CPA; and Jeret Farmer, Accountant.

"Our clients' response to expanding our tax, accounting and personal CFO services has been amazing, which is why we are thrilled the team members from DSS are joining the MCF family to continue to deliver exceptional client experiences," says Dave Harris, CEO of MCF.

Today's environment makes it an ongoing challenge to stay on top of tax laws and regulations. MCF does the hard work for its clients by offering tax advice and preparation services. For tax clients, MCF strives to be deeply engaged in their tax planning to be equipped to help them make the best decisions possible.

ABOUT MCF

MCF Advisors, LLC ("MCF") is a privately held, Securities and Exchange Commission ("SEC") registered investment advisory firm. The firm was both incorporated and registered with the SEC in 2004. MCF's ownership is comprised of ten Shareholders, all of whom are active employees at MCF. MCF has 34 team members in total across their Lexington, Louisville & Cincinnati offices. The firm advises over 700 households and 80 organizations representing over $2 billion of assets under management.

MCF has two operating divisions. The MCF Wealth Management division serves high net worth individuals, families, and business owners. The MCF Institutional division provides services to organizations, including public, private and non-profit corporate defined contribution and defined benefit pension plans, endowments, foundations, and non-profit organizations. For the past six years, MCF was named to Financial Advisor Magazine's Top Registered Investment Advisers list. MCF has also been honored by the Kentucky Chamber of Commerce in their "Best Place to Work in Kentucky" list for the past four years.

IMPORTANT DISCLOSURE INFORMATION

The above commentary is for informational purposes only. MCF Advisors, LLC ("MCF") is a SEC registered investment adviser. Registration as an investment adviser does not imply a certain level of skill or training. The oral and written communications of an adviser provide you with information about which you determine to hire or retain an adviser. More information about the adviser can also be found by visiting: https://adviserinfo.sec.gov/. This is not intended as an offer or solicitation with respect to the purchase or sale of any security. Not intended as legal, tax or investment advice. MCF may only transact business in those states in which it is registered, or qualifies for an exemption or exclusion from registration requirements. This article is limited to the dissemination of general information pertaining to MCF's services. A copy of MCF's current written disclosure statement and customer relationship summary ("Form CRS") discussing our advisory services and fees continues to remain available upon request. The scope of the services to be provided depends upon the needs of the client and the terms of the engagement. If you are an MCF client, please remember to contact MCF in writing, if there are any changes in your personal/financial situation or investment objectives for the purpose of reviewing / evaluating / revising our previous recommendations and/or services.

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