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Merrill Financial Advisor Travis Musgrave
Introduction to Musgrave & Associates

Running Time: (1:45)

The most important thing that we do for our clients is create simplicity so that they're focused on the right things to pursue their goals. We help to consolidate their financial world, to streamline it so that financial matters don't get in the way of them enjoying other aspects of their life.

[Divider]

My team and I offer advice and guidance to our clients and their families, not just financial planning, but investment strategies, insurance, and access to banking solutions through Bank of America.
We have built our local team in such a way that gives us the ability to create very personalized strategies. Much of our work is not limited to clients' investments, but focuses on everything else financial about their life. For example, if they have excess wealth that they would like to carve off and allocate towards philanthropic purposes, we help them with that.

We work with their children to teach them about money and saving. It boils down to being there, being aware, listening to what their financial needs are, and then, helping to connect the client's needs and goals with appropriate strategies and solutions.

[Divider]

I've spent my entire career at Merrill Lynch. The reason my team is at Merrill is because of the resources, the tools, access to research and the connections to people and specialists throughout the firm that help us serve our clients. It's the excellence in all of those things that make up the fabric of our team and Merrill Lynch.

I'm Travis Musgrave. I'm honored to serve my clients and proud to work at Merrill Lynch.

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