

## 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 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.

# Important information

The views and opinions expressed are those of the speaker, are subject to change without notice at any time, and may differ from views expressed by Merrill or other divisions of Bank of America. These materials are provided for informational purposes only and should not be used or construed as a recommendation of any service, security or sector.

Merrill, its affiliates, and financial advisors do not provide legal, tax, or accounting advice. You should consult your legal and/or tax advisors before making any financial decisions.

This material does not take into account a client's particular investment objectives, financial situations, or needs and is not intended as a recommendation, offer, or solicitation for the purchase or sale of any security or investment strategy. Merrill offers a broad range of brokerage, investment advisory (including financial planning) and other services. There are important differences between brokerage and investment advisory services, including the type of advice and assistance provided, the fees charged, and the rights and obligations of the parties. It is important to understand the differences, particularly when determining which service or services to select. For more information about these services and their differences, speak with your Merrill Lynch Wealth Management Advisor.

Merrill Lynch, Pierce, Fenner & Smith Incorporated (also referred to as "MLPF&S" or "Merrill") makes available certain investment products sponsored, managed, distributed or provided by companies that are affiliates of Bank of America Corporation ("BofA Corp."). MLPF&S is a registered broker-dealer, registered investment adviser, Member SIPC and a wholly owned subsidiary of BofA Corp.

Banking products are provided by Bank of America, N.A., and affiliated banks, Members FDIC and wholly owned subsidiaries of BofA Corp.

Investment products offered through MLPF&S and insurance and annuity products offered through MLLA:

<b>Are Not FDIC Insured</b>	<b>Are Not Bank Guaranteed</b>	<b>May Lose Value</b>
<b>Are Not Deposits</b>	<b>Are Not Insured by Any Governmental Agency</b>	<b>Are Not a Condition to Any Banking Service or Activity</b>

CIMA® is a registered service mark of the Investment Management Consultants Association and Investments & Wealth Institute.

CRPC® is a registered service mark of The College for Financial Planning.

The Bull Symbol and Merrill are trademarks of Bank of America Corporation.

© 2021 Bank of America Corporation. All rights reserved.