RETURNS MATTER.
TAXES MATTER.
PLANNING MATTERS.
CLIENTS MATTER.

Bull Financial

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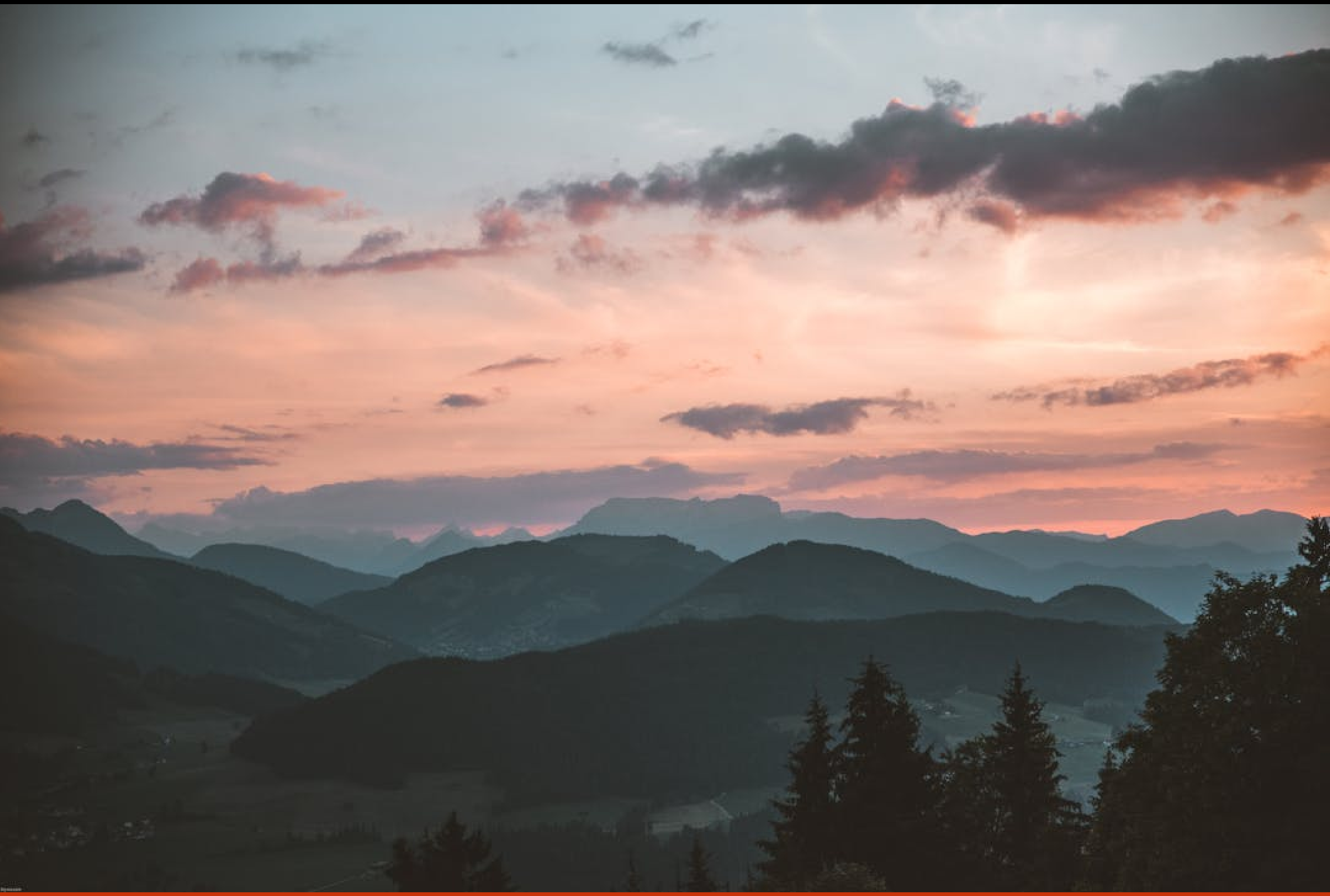
MONEY MANAGEMENT + TAX PLANNING = BETTER FINANCIAL PLANNING



"We are a boutique firm that offers progressive investment and financial planning with a hands-on approach."

-Barry Barnette
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Our Vision

Bull Financial is a financial firm founded by fiduciary Barry Barnette in 2002, which offers professional money management, tax planning, and financial planning to private clients.

Barry's vision for Bull Financial has evolved over the course of his career after seeing the stock market crash of 2008, in which the typical buy-and-hold asset allocation models failed investors.

Furthermore, increased taxes and increased costs, regarding general inflation, health insurance and Medicare in particular, have created the need for a higher level of financial planning that has developed and implemented to help shape his client's financial futures.

This layout is great for a detailed explanation of one topic.

It is this vision that has led to in-house investment management that stays growth oriented, but equally pursues either avoiding or lessening market downturns by actively managing client portfolios. Aiming to reduce client's taxes by using strategies that can reduce taxation over a lifetime. Ultimately creating a network of professionals ensuring that all aspects of his client's financial futures have access to the same knowledgeable, forward-thinking mindset that he strives to maintain.

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Investment Management

"Growth does not have to be achieved by greater risk. Growth can often be best achieved by attempting to alleviate and lessen market downturns while still having access to the full potential and upside of the market."

-Barry Barnette
Bull Financial

We recognize the significant investment of time, money, and stress required to recover from substantial market downturns. Bull Financial focuses on attempting to mitigate downside risk while aiming for long-term capital appreciation through full market cycles. We are not afraid to place an emphasis on and prioritize investment management because

Returns + Tax Planning = Better Financial Planning.

Bull Financial aims to help their clients achieve successful asset management through the use of ETF and mutual fund portfolios that are not restricted to a buy-and-hold strategy of multiple asset classes, but rather seek to achieve results through active management that is risk adverse.

"Barry has worked with me to put together a sound financial plan that addresses growth, income and tax planning. Since starting with Barry in March of 2022, I have retired at the age of 60, paid off a new house, and have more assets than when I started."

-Krista Gibson
Retired from Greer Community Ministries

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