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## **Savant Capital Management Expands Chicago Footprint through Partnership with D3 Financial Counselors**

- D3 Financial Counselors is Savant's fourth Chicagoland merger since 2014
- Partnership increases Savant's assets to \$1.4 billion in the Chicago area, \$6.3 billion overall
- D3 Financial Counselors founder, Donald Duncan, becomes an owner/employee of Savant

**ROCKFORD, Ill. (Oct. 1, 2018)** – [Savant Capital Management](#), a nationally-recognized, fee-only wealth management firm headquartered in Rockford, Illinois, and one of the nation's largest independent registered investment advisory (RIA) firms, today announced it has joined forces with Chicago-based [D3 Financial Counselors](#), a \$290 million RIA.

"Our fiduciary standards, business philosophies, and team-orientated approach are well-aligned with Savant's, making for an excellent match for the two firms and our clients," said Donald Duncan, founder of D3 Financial Counselors. "The partnership allows us to offer more comprehensive financial planning services to our clients, while continuing to do what we do best – helping to build ideal financial futures for our clients, team, and the communities we serve."

Savant and D3 Financial Counselors made the deal official at the end of September. The D3 Financial Counselors team will continue to serve clients at its current locations in downtown Chicago, Downers Grove, Illinois, and Santa Fe, New Mexico.

Founded in 1997 by Donald Duncan, D3 Financial Counselors is an independent, fee-only fiduciary financial planning firm based in downtown Chicago, with additional locations in Downers Grove, Illinois, and Santa Fe, New Mexico. D3 Financial Counselors offers financial planning, portfolio management, and wealth management services to individuals and families, corporate executives, medical professionals, and business owners. This merger further strengthens Savant's Chicago footprint by increasing its presence to six offices located in downtown Chicago, Downers Grove, Hoffman Estates, Naperville, St. Charles and Wilmette.

"As we continue to expand and identify future growth opportunities in Chicago and beyond, we look for RIA firms that are committed to the fiduciary standard – always acting in clients' best interest," said [Brent Brodeski](#), Savant CEO. "D3 Financial Counselors is an RIA firm that embodies fiduciary excellence and we are proud to welcome the entire team and their clients to the Savant family."

Savant remains committed to growth by supporting future M&A opportunities, both in Chicago and nationwide. For more information, visit [savantcapital.com](http://savantcapital.com).

### **About Savant Capital Management**

Savant Capital Management is a leading independent, nationally-recognized, fee-only firm serving clients for 30 years with nearly \$6.3 billion in assets under management. As a trusted advisor, Savant Capital Management offers investment management, financial planning, retirement plan and family office services to financially established individuals and institutions. Savant also offers corporate accounting, tax preparation, payroll and consulting through its affiliate, Savant Tax & Consulting.

Savant is regularly recognized among the top wealth managers in the United States. Savant was the recipient of the 2015 Best-in-Business IMPACT Award™, part of Schwab's IMPACT Awards® program to recognize excellence in the business of independent financial advice. Savant has consistently received other industry recognitions including recently being featured on the *Forbes'* top 200 financial advisors list, the *Barron's* top 40 independent advisory firms list, being named the #9 rated RIA firm by *Financial Planning* magazine, and included in additional top advisors lists by *Financial Advisor* magazine and *InvestmentNews*.

Savant Capital Management is a Registered Investment Advisor. Savant's marketing material should not be construed by any existing or prospective client as a guarantee that they will experience a certain level of results if they engage Savant's services and may include lists or rankings published by magazines and other sources which are generally based exclusively on information prepared and submitted by the recognized advisor. [Click here](#) for more information about Savant or to view our Important Disclosures.

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