

**Walnut Street Securities, Inc.®**  
A MetLife Company

Helping to build financial freedom and putting our experience and resources to work is the cornerstone and philosophy of Wharton Financial Services (WFS).

We understand your desire to find trusted advisors who can help you make the right financial decisions. At WFS, we'll take the time to understand your needs and use our experience, training and resources to aid you in attaining your goals.

Sound advice should be independent as well as informed and that's exactly what we offer. As Independent Financial Advisors, we are not tied to any financial provider or product, and can offer unbiased advice to build strategies using the widest possible marketplace, based solely on your needs and goals.

**David Kring**  
*Financial Planner*  
*Registered Representative*  
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Securities and investment advisory services offered through Walnut Street Securities, Inc. (member FINRA/SIPC), and a Registered Investment Advisor, which is a separate entity from Wharton Financial Services (WFS).

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**\* I will work with you and your tax and legal advisers to help you select the most appropriate solutions to suit your specific needs and circumstances.**

*Wharton*  
*Financial*  
*Services*



**Independent by Choice**

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A Successful financial program begins with a long term view, and is about more than chasing today's hot investment trend or timing the market.

We develop a long term strategy that incorporates the solid foundation of economic and portfolio theory and considers your personal and professional goals, time horizon, risk tolerance, and other values that make you and your financial goals unique.

We believe in building relationships that are solidly constructed for the long journey ahead.

## PRODUCTS AND SERVICES

- Comprehensive Financial Planning
- Investment Planning
- Retirement Planning
- Traditional & Roth IRA's
- Education Funding Strategies
- Health Savings Accounts
- Mutual Funds
- Risk Management Strategies
- Estate Conservation
- Charitable Giving Strategies\*
- 401(k) & 403(b) Plans
- IRA Consolidation/Rollovers
- Distribution Planning
- Fee based or Commission

**Contact us for a free no obligation review of your investment portfolio**



**Serving the Delaware Valley**

**David Kring**

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