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Fiduciary Private Wealth Managers

What's New With Paragon Private Wealth Group

Paragon Private Wealth Group™ is thrilled to bring you our first newsletter! In our first six months since opening. We've had our own obstacles to get through just like everyone else in these times. But we're excited to see how much we've grown in just a short time. It's been an interesting past year for everyone, but we want you to know PPWG™ is here to help you get through these challenging times.

Paragon Private Wealth Group is an independent financial advisory firm. We're a fiduciary at our core. We will always act on behalf of putting our clients' interest ahead of our own. PPWG understands that we have a duty to preserve good faith and trust. Being a fiduciary requires us to be bound both legally and ethically to act in our client's best interests.

Unlike the big financial firms, we won't push our clients into anything they don't feel comfortable with. We also don't take money to promote or push certain agendas to our clients.

PPWG also partners with several financial and technology companies to ensure that we have the technology to deliver business insights to our clients to make create the best financial opportunities and strategies in place. This is why PPWG has experienced such rapid growth since our start and are thrilled to announce our expansion!

Speaking of partners, Paragon Private Wealth Group is excited to bring on our new partner to the company, Michael Reeder! With the new partner, also brings a new office in Fort Worth. Now you can obtain all of PPWG's services and insights from Michael on the west side of the metroplex.

PPWG is also upgrading our office space in the Dallas area and with the new location also comes a new website! We never expected that within six months of launching that we would be able to announce a new branch office, a new partner to go along with it, upgrading our Dallas office and an exciting new website!



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Introducing Our New Partner - Michael Reeder

Michael Reeder is the newest addition to the Paragon Private Wealth Group family and we're thrilled to have him on board! Michael was a star at Texas Christian University (TCU) where he not only played football but graduated with a Bachelor of Business Administration (Summa Cum Laude) in 1997 and a Master of Business Administration (MBA) in 1999.

Since graduating, Michael has enjoyed a varied career spanning multiple industries and positions in sales and business development. His roles have included stints in oil and gas, healthcare, advertising, finance and real estate. For the last several years, Michael has worked as the Owner & Broker of Chisholm Realtors LLC, a residential brokerage primarily focused on Tarrant County. Prior to that, Michael spent several years as a Financial Advisor with Merrill Lynch where he initially met our founding partners at PPWG.

Michael's broad business exposure and educational background gives him a wealth of knowledge and experience that is invaluable as an advisor and now as a partner at PPWG. He brings to Paragon a passion for investing and a primary focus on meeting the retirement needs of our clients while creating generational wealth.

During his time at TCU, Michael was the FG kicker for the Horned Frogs where he earned Consensus All American honors and won the prestigious Lou Groza Award, given annually to the top collegiate placekicker in the country. He also won the Dan Rogers award as a Team MVP and was recognized by his teammates as a Team Captain for multiple seasons.

Michael and his wife Heidi were college sweethearts at TCU. They currently reside in Fort Worth with their three children (David, Mila and Jody), two of whom were adopted through the Gladney Center in Fort Worth. They also have a yellow lab named Lily and a dachshund named Leia. Together the family enjoys game nights, video games and playing sports, especially football and volleyball. Michael is very active with all things related to TCU and is also an avid golfer.

Michael has proven to be a winner both on and off the field since his college days. He's the prime example of what we want to represent at PPWG and are thrilled to be bringing him on as a partner! We know that he can help you with your financial security and future endeavors.

Black Diamond

Black Diamond® Wealth Platform has been around since their launch in 2005 and are considered to be one of top cloud-based financial technology companies currently out. We have partnered with Black Diamond to help streamline our operations and deliver better up to date insights for our clients.

By partnering with Black Diamond, it allows us to put more focus on what our client's needs are. It enables us to act as a true fiduciary and help you through your entire wealth journey and give you the best client experience we can.

Black Diamond gives us a comprehensive wealth management platform that enables us and our clients for success not only today but for the future. The platform is cloud-based and has intuitive dashboards.

We at PPWG believe Black Diamond to be the ultimate business partner by combining high tech with high touch.

Charles Schwab

Charles Schwab is another company that PPWG is proud to partner with. They truly empower our firm to allow us to put clients first. They allow us to truly act as a fiduciary and offer us the resources we need to get the best for our clients.

For over 30 years, Charles Schwab has been an instrumental partner for independent investment advisors. Their main goal has always been their commitment to the success of these independent advisors and has never faltered.

Charles Schwab offers a specialized consulting team specific for PPWG. Giving us a blueprint to not only reach our firm's goals but enabling us to exceed our client's goals.

Schwab is always innovating and improving their technology. Their goal is to try to provide high value technology and insights with little to no cost to their clients. Delivering a truly exceptional client experience for anyone that works with Schwab.

Investnet MoneyGuide

Investnet MoneyGuide helps us make sound financial strategies for our clients. Investnet MoneyGuide's main goal focuses on helping advisors use financial planning to more effectively motivate each client to create, apply and sustain an investment plan that best meets their overall financial goals.

MoneyGuide's software is an internet-based financial planning software that enables a unique client-centered approach. The software offers a goal-based planning approach,.

Although Investnet MoneyGuide develops this software specifically for advisors, it is their belief that everyone should benefit from the professional financial advice. The software they use doesn't replace the advisor, but instead enhances their value with a more complete financial planning process. At their core, they're a financial software company, but their goal is to improve the financial lives of anyone that has access to their product.

Titleist Asset Mgmt LTD

Titleist Asset Management LTD enables us to have access to top-tier clearing and custody, industry leading technology and access to a team of investment professionals that specialize in securities analysis, financial planning and portfolio management. They take the time to gauge the advantages of all strategies and recognize there are strengths in most and weaknesses in all. Titleist embraces unconventional ways of thinking all while adhering to the core pillars of successful investing.

With Titleist as a partner, PPWG is better enabled to assign probabilities to various outcomes and make investment decisions based on a distribution curve of those outcomes.

Titleist also enables us to customize our allocations and investments specifically for each client. They consider the individual client and their unique profile to be the key determinant in both allocation and securities that they'll suggest.

→ Path to Paragon™ Podcast

Fiduciary Private Wealth Managers

Welcome

Thank you for subscribing to our brand-new Path to Paragon™ newsletter. Once a month we'll take you behind the scenes of the show with bonus content, a sneak peek into future episodes, links that are relevant toward that episode, and a look inside our mailbag from listeners. And make sure to join our Facebook group where you can connect with fellow listeners.

Behind the Mic

We're lucky to have a real pro and natural behind the microphone with our podcast with Andrew Johnsen. Andrew is a proud partner and a lead financial advisor at Paragon Private Wealth Group with over 10 years' experience in the industry. Andrew looks to tackle challenging subjects that are relevant for the time of year and how they may impact your portfolio. Beyond the guests, Andrew may also be joined by PPWG's other partners Alan Keppler and Michael Reeder depending on the podcast's subject matter.

Want to hear something specific?

If there's something else you'd like to see in here or a specific topic you'd want us to discuss on a future episode, send us an email at info@paragonpwg.com. Whether it's a specific question you have for the host or a guest please let us know and we'll dive deeper into the topic on our next episode.

Expected release dates

It is our goal at Paragon Private Wealth Group to release a new Path to Paragon™ podcast at the beginning of each month. We will bring on different guests from around the country as well as in the DFW area to cover topics such as finance, the law, politics, real estate and much more. Our next guest will be Michael Reeder who just joined PPWG as a new partner and is an expert in both Finance and Real Estate.

Find Our Podcast on Google Play, Spotify and iTunes!

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