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join forces to form **Paragon Wealth Management**,
a new enterprise that strives for excellence in
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Better Together

McNamara Financial Group and Rosenau Financial Advisors join forces to form **Paragon Wealth Management**, a new enterprise that strives for excellence in helping clients plot out the future.

by **Bill Donahue** | photo by **Stacy Crescitelli**

BETWEEN THE THREE OF THEM, CHARLES J. MCNAMARA III, CMFC, LUTCF, RICARDO J. FERREIRA, CMFC, AND PHILIP ROSENAU, CHFC, HAVE SEVERAL DECADES OF EXPERIENCE HELPING CLIENTS PLAN FOR THE FUTURE WITH CLARITY AND CONFIDENCE. These three Bucks County financial professionals spent the past 15 years collaborating to serve the best interests of clients, but their gentleman’s agreement has since reached its end.

As of September 1, the trio formalized their partnership—effectively merging McNamara Financial Group and Rosenau Financial Advisors, two Bucks County financial-services stalwarts—to create a new enterprise called, fittingly, Paragon Wealth Management. The firm’s pledge to clients: “to continually strive for excellence through discipline and the pursuit of knowledge.”

“A paragon is a model of excellence,” says McNamara, who founded and served as managing partner of McNamara Financial Group. “We have always prided ourselves on our ability to provide excellent service to clients, but we all came to the realization that



Members of the Paragon Wealth Management team include (left to right): Philip Rosenau, Charles J. McNamara Jr., Lori Carroll, Charles J. McNamara III, Ricardo J. Ferreira, and Jonathan Childs.

help clients pursue their short- and long-term financial goals.

“We see this largely as a branding change,” McNamara says. “Clients will not see any material change to their accounts, nor do they have to take any action. Also, all of our contact information—email, website, phone numbers—will remain the same for an extended period of time, so clients will see very little difference other than the physical branding.”

That said, Paragon Wealth Management does offer some tangible benefits that did not exist previously.

“We have been growing nicely over the past few years, but we got to a point where we saw the need to make some changes in order to provide the same level of service,” says Ferreira, who specializes in portfolio strategy. “With the formation of Paragon, it will allow me more time to make sure our clients’ investments and portfolios are run the way they should be, while Charlie and Phil will have more time to meet with clients face to face, cultivating relationships.”

Rosenau, the founder of Rosenau Financial Advisors, comes from an entrepreneurial family. Having started his working life at the tender age of 8, he found that his strong work ethic aligned with that of McNamara and Ferreira. He also liked the fact that their respective skill sets complemented his own.

“Some advisors focus only on life insurance or investments,” he says. “We cover the whole gamut: investment planning, Medicare, social security, estate planning, annuity needs, income planning. We have a strong menu of skill sets and knowledge to cover the full picture of financial needs. Having someone who can guide clients with experience and expertise certainly helps to give [clients] confidence when making decisions.”

“Having one name, in Paragon, will be less confusing for clients in terms of how we work together,” he continues. “With only so many financial advisors in Doylestown, people would start googling who to call, so they might start by calling me and then wind up calling Charlie 10 minutes later. We were already working closely together, but moving forward, it just made more sense to grow together.”

In all, the firm will have five full-time ad-

visors, as well as two assistants, plus Jonathan Childs, ChFC, RICF, as a full-time financial planner. Childs, who has a master’s in financial services and intends to take his CFP® exam later this year, had previously worked with McNamara Financial Group on an independent basis. McNamara suggests the firm may soon further expand its staff to accommodate an anticipated increase in demand.

The team at Paragon Wealth Management maintains an affiliation with LPL Financial. LPL enables the firm to retain its financial independence, while also providing access to enhanced trading and financial planning soft-

ware, dynamic analytical programs, and other tools designed to enrich the client experience. For example, the financial planning software provides clients with an online dashboard so they can track progress against their goals. In other words, clients can view all of their assets in one central location, with real-time asset values, so clients can see exactly where they stand, financially speaking.

Other changes on the horizon include upcoming client-appreciation events, as well as the revival of a popular monthly event called Finances on Tap. Best

described as an “informational happy hour,” Finances on Tap will take place at a nearby restaurant, in which members of Paragon’s advisory team share their knowledge on finance-related topics over an adult beverage or two.

“I realize that most people don’t like change,” McNamara says. “Our commitment to our clients remains as strong as it’s ever been. If anything, our evolution only enhances our team’s capabilities. If and when our clients see a difference in the way we do things, I think they will see that it’s a change for the better.” ■

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 **Paragon Wealth Management**
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we work better together than separately. The evolution of this firm will give each of us more time and energy to spend with our clients, and we will also benefit from some economies of scale on the backend.”

McNamara, Ferreira, and Rosenau began informing clients of the change earlier this year. Perhaps the most noticeable change, apart from the new name and logo, is the firm’s relocation to new headquarters a stone’s throw from the former McNamara Financial Group office.

While clients may notice the change of address and a different name on the front door, the firm’s goals remain the same: to use its knowledge and expertise, guided by the most robust planning tools available, to