Certified Public Accountant

Series 7 registration

University of Notre Dame, B.A. in Accounting

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As a Financial Advisor, Paul brings his longstanding industry knowledge to bear when developing comprehensive financial advisory, wealth management, and consulting services for successful professionals, executives, and business owners. As a managing advisor, he has the privilege of overseeing many relationships and helping to ensure that every client's experience is consistently high-quality. Clients can expect transparent communication, comprehensive financial advice, and proactive plan implementation. Serving clients is his first, and highest, priority.

With over 45 years of experience as a tax professional and over 35 years as a financial planner, Paul has learned that change is a constant, and a lifetime of learning is the only response. He is continually developing his craft and committed to staying abreast of the ever-changing regulatory and economic landscape.

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