

The Paragon Advisor

Welcome to The Paragon Advisor by John P. Napolitano, Chairman and CEO of U.S. Wealth Management, LLC

You're probably wondering why you need a regular newsletter about practice management. I realized, after years of practice as a financial planner, and an insatiable appetite for best practices, that the financial world needed a place for advisors to see divergent points of view about what are considered best practices. This is the only publication dedicated to the intersection of life planning and business planning, exclusively for financial professionals. Its mission is to help advisors build a scalable, profitable Wealth Management business that allows you, the owner(s), to also carve out more time for a better life.

For many of you, success already runs in your veins. Your business grows year after year; your income increases year after year, and your free time and fun are reaching such exciting heights that you want to pinch yourself just to make sure that you're not dreaming. But dreaming is OK. And all of us, regardless of income or business success, have a vision of how great things could be, if only.... Dan Sullivan, founder of The Strategic Coach, calls this dreamland "The Gap." No, not a place where you buy jeans for your kids, but the black hole between your reality today and where you dream of being. That is where The Paragon Advisor will prove invaluable to your business and personal life. We encourage dream-

ing. The promise of The Paragon Advisor is to lead you through the steps to implement necessary tactics to make those dreams reality, as soon as possible.

The Paragon Advisor is unique in that it is the only publication that will feature a who's who of writers in each issue. We have assembled the best of the best, all eager to share their wisdom so that you can have a more fulfilling life and a better business. Our regular contributors include Dan Sullivan, Ron Carson, Steve Sanduski, Bill Cates, Bob Veres, Peter Montoya, George Kinder, Ed Jacobsen and many other top consultants and writers. Our common vision is to share our passion for your financial advisory practice and help it become a wealth management business capable of making every day more enjoyable, in line with your business plan and personal life plan.

We hope that you enjoy The Paragon Advisor, and share it with like-minded professionals who can benefit from our all-star team of contributors.

We also encourage you to visit the links in the sidebar to read more from our contributors. Each is a specialist in a different area of life and business planning and each piece can make a vital difference in your practice and your life.

Is It Time for a Change? Come find out about our belief in the three C's:
Culture, Commitment and Coaching.
Find out more: IsItTimeForAChange.com