# THE PARAMOUNT PLAN

…because getting from where you are
to where you want to be is **paramount**

PARAMOUNT
WEALTH ADVISORS

Areas of Planning

Estate Planning Strategies • Business Succession • Retirement Planning
Investment Planning

## James A. Longo, Jr., CPA*, PFS™, CFP®, CRPC®

Financial Planner

Jim's focus each day is to fulfill the mission statement of his firm; to simplify the financial aspects of clients' lives so they have more time to spend on the activities in their lives that bring them joy, happiness and fulfillment. He takes time to build deep relationships with his clients who are primarily Business Owners, Corporate Executives and other Affluent families. Knowing and understanding his clients allows Jim to help them define their objectives, make clear decisions and implement proactive financial planning strategies, in short "to help them get from where they are to where they want to be". Jim uses a fee-based approach along with sophisticated modeling tools with his clients so he can objectively develop and implement strategies that are designed to limit their risk and volatility over the long term and maintain the integrity and relevance of their plan.

Jim is a graduate of DePaul University earning both a B.S. in Commerce Accountancy and a Master of Accountancy. His diverse business career has included ownership/management of a local trucking company, management of an import/distribution company, as well as various consulting engagements in the areas of re-insurance accounting, computer system implementation, print and internet advertising, and sales management/training. This diversity provides Jim with special insight into the business and personal financial challenges faced by business owners, executives and professionals alike.

Jim and his wife live in a Chicago suburb, have two children and five grandchildren. Some of his hobbies include golf, photography, and sporting clays. He is active in his parish, the Cursillo Movement and several charitable organizations.



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# Client Engagement Process

## Establish

The scope of our engagement is based on your unique situation, needs, objectives and values. We define the responsibilities, time frames and expectations for our relationship so that the process can go smoothly.

## Holisitic Audit

During this step we utilize technology to gather your objective financial data, while spending the majority of our time focused on the heart of your Paramount Plan, your goals and objectives. This step allows us to explore your current situation, define "where you are," and understand "where you want to be."

## Analysis

During the analysis step, our in-house design team creates a sophisticated model of your financial situation in order to identify the difference between your current situation and your objectives. Our team then stress tests your model and develops the best strategies to support your long-term success.

## Your Paramount Plan

Our findings and recommendations are presented in written form with the support of our technology that continually updates your objective data. During your plan presentation, we will discuss your planning solutions and determine the strategies to implement.

## Implement

Following your Paramount Plan presentation, a plan of action can be established to help aid you in the physical implementation of every facet of your plan. The most well prepared plan of any type is useless without proper implementation which of course is always at your discretion.

## Review & Update

We can meeting annually, at your discretion, to review and update your Paramount Plan. This allows us to maintain the integrity of your plan as your objectives change over time. This ongoing process is often overlooked.

## Introduce

Upon confirmation that you are very happy with our services, we will ask for your help in identifying and introducing us to people in your circle that you believe would benefit from our process. This allows us to spend minimal time with marketing and the majority of our time with clients like you.