

# Our Mission

By taking time to build deep relationships with clients we help to define objectives, make clear decisions and chart a course of action to simplify the financial aspects of their lives; giving them more time to spend on the activities in their lives that bring them joy, happiness and fulfillment.

## Contact Us

### Paramount Wealth Advisors

17W220 22<sup>nd</sup> Street Ste. 410A  
Oakbrook Terrace, IL 60181

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

Financial Planner

[Jim.Longo@LFG.com](mailto:Jim.Longo@LFG.com)

(630)501-1041

# Paramount Wealth Advisors

---

Getting you from where you are, to  
where you want to be

Visit us on the Web:  
[www.pwalfa.com](http://www.pwalfa.com)

\*Licensed, not practicing.

Securities and investment advisory services offered through **Osaic Wealth, Inc.**, member FINRA/SIPC. **Osaic Wealth** is separately owned and other entities and/or marketing names, products or services referenced here are independent of **Osaic Wealth**.  
CRN-4975785-093022





## Financial Planning

---

- Ongoing review of specific goals and objectives and implementation of any necessary Plan changes
- Maintain an updated Financial Condition Model
- Reporting on the achievement of objectives
- Advice and analysis of all aspects of your financial life including major purchases, retirement plans, college funding, estate plans, and any other investment programs
- Timely response to any questions or concerns you have regarding financial matters
- Maintain Personal Financial Webpage (PFW)
- Store important documents on PFW Vault
- Ability to provide the same level of comprehensive solutions to family, friends, and business associates

## Retirement Planning

---

- Ability to determine Financial Independence
- Thorough Social Security analysis
- Develop and implement Retirement Income Distribution strategies
- Pension analysis

## Investment Planning

---

- Highly personalized service
- Identify investment objectives and risk tolerance
- Develop a Customized Client Investment Policy Statement
- Independent and objective review of products and services in the marketplace
- Review and provide analysis on existing investments
- Exclusive access to institutional investment programs not available directly to most individual investors
- Review and control over investment costs
- Active management of taxes in any non-qualified account
- Access to world-class teams of professional money managers
- Systematic portfolio rebalancing to manage risk
- Ongoing evaluation of results and performance
- Comprehensive account aggregation for your family's entire financial life
- Fees aligned with a comprehensive wealth management offering – not transactional
- Remain “in touch” with changes in global capital markets

## Administrative Services

---

- Maintain accurate and up to date titling of accounts
- Review and update beneficiary designations
- Complete name and address changes, when necessary
- Coordinate contributions and distributions within investment accounts
- Assist and manage rollovers and transfers to investment accounts
- Coordinate annual RMD's with tax advisor

## Estate Planning

---

- Review and provide analysis on current documents
- Assistance with document design
- Coordination of asset titling and beneficiary designation
- Coordination with Attorney

## Risk Management

---

- Consulting and evaluation of risk management
- Review and provide analysis on current risk management portfolio
- Implementation of Life Insurance, Long Term Care, and Disability Insurance
- Recommend specific insurance designs based on the result of our completed needs analysis
- Independent and objective review of products and services in the marketplace

## Business Owner Planning

---

- Review and development of objectives
- Design and coordination of Buy-Sell Agreements
- Executive Compensation Strategies
- Implementation and ongoing monitoring of Qualified Plans, including participant education
- Access to a network of M&A professionals

## Income Tax Reduction Strategies

---

- Review of your tax return
- Income Distribution Planning
- Coordination with CPA
- Coordination with Third Party Administrator
- Provide tax documentation to CPA with client