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FLAGSHIP WEALTH ADVISORS, LLC

Partnering with Clients for Success

"WE HELP FAMILIES PLAN FOR IMPORTANT MILESTONES AND ENJOY LIFE THROUGH ALL ITS STAGES, FROM COLLEGE THROUGH RETIREMENT."

—PAUL V. RYAN, JR., CFP®

Walk into the North Shore office of Flagship Wealth Advisors and you're immediately greeted by the friendly, helpful staff and a reassuring sense of calm. That's because Founder and Managing Director Paul V. Ryan, Jr., CFP® and associates put client relationships first. "We take a personal approach to every client relationship," Paul says. "We get to know them. We get to know their families. We want to know what is important to them and their outlook on wealth management, so we can truly be an effective partner in helping them reach their goals."

Treating Clients Like Family

Flagship Wealth Advisors combines the family-like atmosphere with the expertise of an extended team of highly experienced associates—connected to the firm by their broker-dealer affiliation. Paul relies on this team of financial colleagues to provide clients with supplemental or specialty services, such as tax planning, life insurance and generational planning.

Paul founded the firm in 1997 to offer clients personal wealth management and financial planning services. Over the years, he has carefully hired staff and associates who share his approach to personalized customer care. There's a family atmosphere in the office—one that extends to clients. In fact, it's not uncommon for Paul to invite families to include their children and grandparents in important conversations about money. "Finances extend through generations of families," he says. "Our team understands wealth management and family dynamics."

Charting a Financial Course

"Families today are faced with daunting financial burdens, especially when it comes to paying for a college education," Paul says. "Some feel they have to choose between their children's college or retirement. We help them plan for these milestones so they can live the lifestyles they want to enjoy, without making tough 'either-or' decisions. We work together as a team. No matter the circumstances or market conditions, it's our job to help clients manage their wealth and plan for the future."

FLAGSHIP WEALTH ADVISORS LLC

Registered Investment Advisor

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