

# *Paramount*

FINANCIAL STRATEGIES, LLC

## **VISION STATEMENT**

Agile, experienced, client focused team of financial professionals delivering “best in class” service.

## **MISSION STATEMENT**

As a financial services firm committed to serving Southeastern Wisconsin, we will distinguish ourselves by achieving trusted financial professional status delivering advice and services which help our clients as they build and preserve wealth.

Our commitment to “Best in Class” service will add value in all that we do providing tangible results for our clients, our community and ourselves.

## **CULTURE** **“PURPOSE AND PASSION”**

1. **COMMITMENT:**  
I am committed to the Vision, Mission, Culture and success of Paramount Financial Strategies, its clients and its employees.
2. **INTEGRITY:**  
I am dedicated to doing what is right no matter what the cost. I will at all times help client strive to protect the assets of and not compromise the trust of our clients.
3. **OWNERSHIP:**  
I am responsible and accountable for my actions and take ownership of everything that takes place in my work and in my life. I know that for things to change, first I must change.
4. **PERFORMANCE:**  
I will deliver with flawless execution advice and services, which strive to exceed expectations and help clients create maximum value.
5. **TECHNOLOGY:**  
I will embrace new technologies and continually look to “Best Practices” for ways to do more with less and stay on a path of constant and continual improvement. I will look to process and create efficiency with the best use of resources.
6. **COMMUNICATION:**  
I will focus my thoughts and energy with good purpose using empowering and positive conversation. I will support fellow team members to create a “win/win” approach. I will embrace both internal and external clients with respect, compassion and a “can do” attitude.
7. **SUCCESS:**  
I will think and act like an entrepreneur. At all times, I will display my inner pride, prosperity, competence and personal confidence. I am focused on maintaining and sustaining the financial discipline and health of Paramount Financial Strategies.
8. **TEAMWORK:**  
I will accept my obligation to consistently learn, grow and develop skills which support the team and our ability to exceed service expectations. I will leverage the knowledge and expertise of others while remaining compassionate to share what I have learned and experienced.

Paramount Financial Strategies, LLC offers securities through AXA Advisors, LLC (NY, NY 212-314-4600) member FINRA, SIPC. Investment advisory products are offered through AXA Advisors, LLC, an investment advisor registered with the SEC. Annuity and insurance products offered through AXA Network, LLC. Paramount Financial Strategies, LLC is not owned or operated by AXA Advisors or AXA Network.

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