



Veronica Caulfield, Paul V. Ryan Jr., and Christine MacInnis

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Paul V. Ryan Jr., CFP®, Managing Director

in large part to referrals from clients. Ryan, who has been licensed since 1988, has guided many families, couples and individuals through all types of market conditions, including the 2008 Wall Street crisis.

“While many people throughout the country were concerned about how the market drop would affect their retirement, we positioned our clients into appropriate asset classes, which is designed to help minimize portfolio volatility,” he says.

Ryan also serves as the managing executive with the largest broker/dealer group in New England, Royal Alliance

Associates, Inc., one of the country’s most respected networks of independent advisors. There are more than 45 independent

professional representatives in the group managing more than \$1 billion in client assets. As part of the Royal Alliance family, Flagship Financial offers the resources and experience associated with larger firms, with the personal attention their clients desire. As an independent firm, Flagship Financial Advisors, LLC provides unbiased advice and designs portfolios that are tailored to each client’s unique financial circumstances while maintaining the utmost transparency.

“Our clients repeatedly say to us that they value how we tailor their current investments with the investments we suggest, based on their needs,” Ryan says. “The best thing about our business is that we get to help folks become and feel more independent in their retirement.”

Flagship Financial Advisors, LLC

Personalized Wealth Management for Retirement

Retirement should be a time to relax. Concerns about the global economy and uncertainty over the future of taxes, health care, Social Security and other variables, make it increasingly difficult to

know which way to turn. Massachusetts-based Flagship Financial Advisors, LLC helps take the worry out of wealth management for retirees and those who are approaching retirement.

“We believe in doing the planning before we start with investment selection,” says Managing Director Paul V. Ryan Jr., CFP®. “You have to know where you want to go, before deciding how to get there.”

From wealth management to retirement planning, estate planning and more, the Flagship team customizes plans based on each client’s risk tolerance and goals, making age- and lifestyle-appropriate adjustments as markets fluctuate.

Founded in 1997, Flagship Financial Advisors, LLC has grown steadily, thanks

- Investment Counseling
- Retirement Income Analysis
- Tax-Efficiency Analysis
- Estate Tax Analysis
- Asset Protection Planning
- Charitable Giving Strategies
- College Funding Strategies
- Fee-Only Planning

FLAGSHIP FINANCIAL ADVISORS LLC

301 Edgewater Place, Suite 400
Wakefield, MA 01880
781.224.9924 | 800.631.9997
www.FlagshipFA.com

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