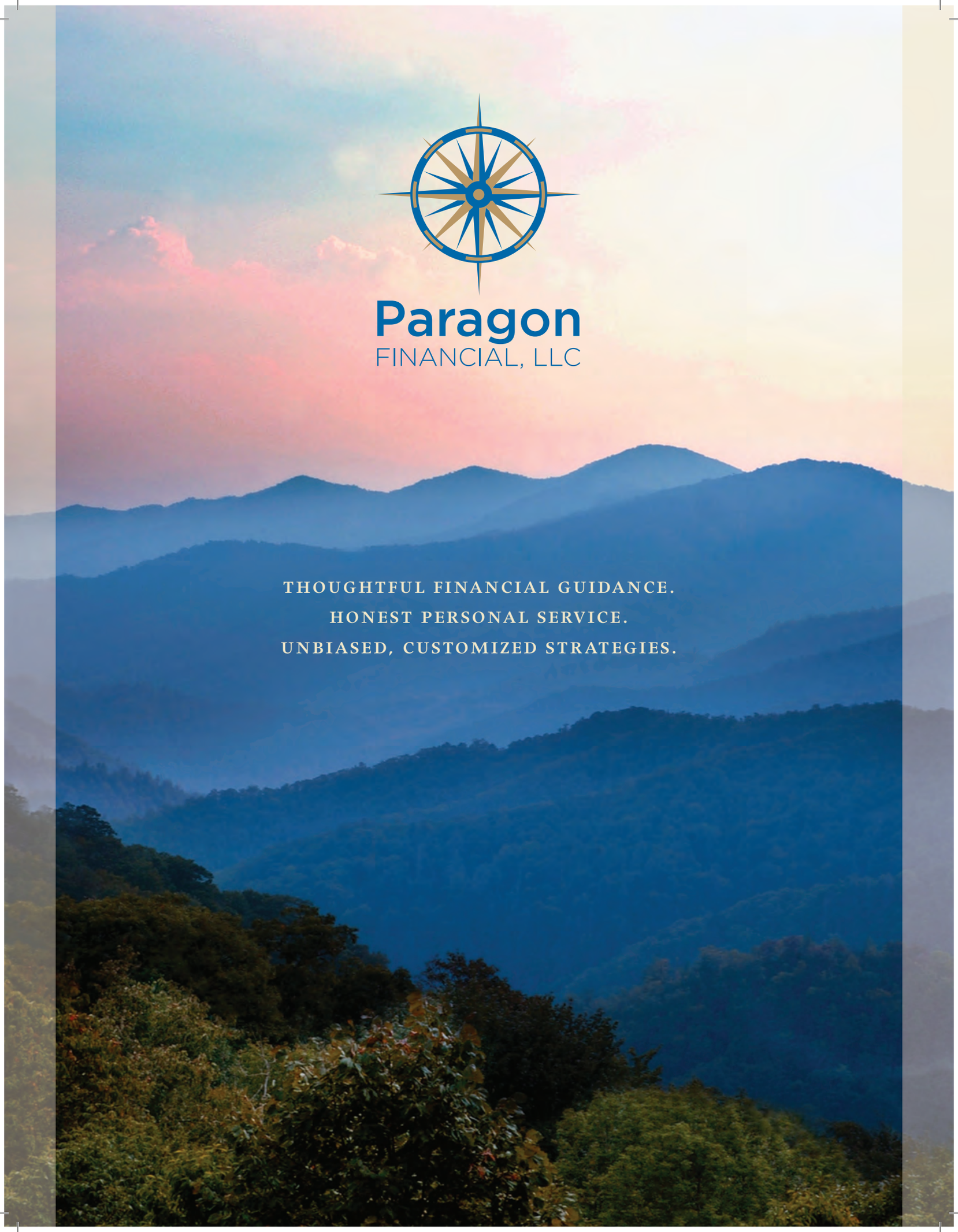

Paragon
FINANCIAL, LLC
THOUGHTFUL FINANCIAL GUIDANCE.
HONEST PERSONAL SERVICE.
UNBIASED, CUSTOMIZED STRATEGIES.

FINANCIAL STRATEGIES TO *SIMPLIFY* YOUR LIFE

Planning for your retirement and your legacy can be complicated and overwhelming. We understand. Our team has more than 50 years of combined experience developing financial strategies to help our clients simplify their financial situation and instill confidence that their goals for the future will remain within reach.

As a client of Paragon Financial, LLC, you will benefit from our commitment to customizing a plan that aligns with your personal goals, while offering you an atmosphere of care, communication and mutual respect. Because your best interests are our top priority, you can rest assured that we will embrace change, track and communicate market trends and seek innovative methods to address your evolving needs.

OUR MISSION

We are committed to being your long-term trusted partner, helping you make well-informed decisions by listening to your goals and aspirations, responding to your needs and guiding you toward financial independence.

CREATING YOUR CUSTOMIZED PLAN

Identifying your values, your investment history, your risk tolerance and your goals, for yourself and your family, is an important first step in our comprehensive planning process. By getting to know you and your unique circumstances, we can map your current financial situation and build an optimal selection of investment vehicles to position you to gain in rising markets and minimize losses in market downturns.

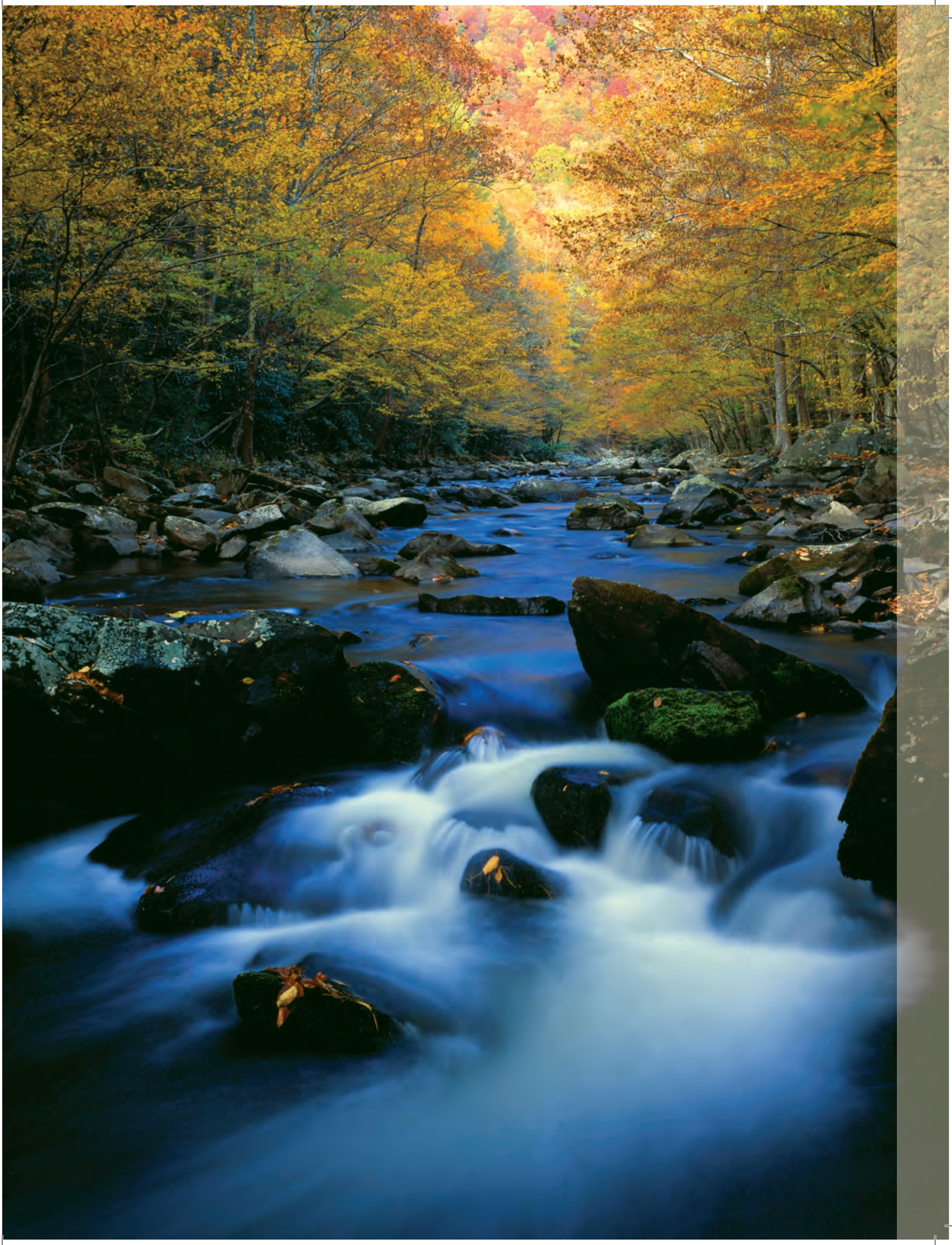
Once you fully understand and are satisfied with the strategies we recommend, we not only implement your plan, but also provide ongoing review and monitoring to ensure your needs are being met.

We can provide you with guidance that encompasses wealth management, investments and estate planning by offering services and strategies for the following:

- Mutual funds
- Domestic and foreign stocks
- Brokered CDs
- Alternative Investments
- Money market funds
- Bonds
- Traditional and Roth IRAs
- Trusts
- Wills
- Charitable giving strategies
- Tax reduction strategies

COORDINATING YOUR COMPLETE FINANCIAL LIFE

We have assembled a team of experts—attorneys, CPAs and insurance specialists—who can be relied upon should you need their expertise. Because we strive to address all your financial needs, we coordinate the activities of these professionals to guide you along the appropriate financial path whenever your circumstances change.



ABOUT PARAGON FINANCIAL, LLC

As a client of Paragon Financial, LLC, you will benefit from the knowledge, experience, insights and passion of our professional team, which has gained a reputation for providing thoughtful financial guidance, honest personal service and unbiased, customized strategies.

DANA GRAVES

A graduate of Wingate College, Dana entered the financial services industry in 1993. Early in his career, he worked closely with CPAs and attorneys around the country to help their clients with investments and estate planning. In 1999 Dana helped start JPS Wealth Management, a firm founded on the principles of unbiased advice and personal service. As JPS Wealth Management has transitioned to Paragon Financial, LLC, these same values continue to serve as guiding principles for the firm.

Dana is a Certified Financial Planner™ practitioner who continues to further his knowledge in this ever-changing industry. When not representing his clients' best interests, he enjoys spending time with his wife, Katie, and their children, Luke and Allie. Dana also is involved with his children's sports teams and likes to spend time outdoors.

DAVID HART

David has nearly two decades of experience in the financial industry. While he often helps clients establish and manage their investment portfolios as an investment advisor, David is also a Certified Financial Planner™ practitioner who enjoys assisting his clients as they plan their financial futures.

David attended UNC-Chapel Hill on a Morehead Scholarship earning degrees in Economics and Business Administration. Like Dana, he continually strives to expand his knowledge to further benefit his clients. David is an Asheville native who enjoys spending time with his wife, Judy, and their four boys. He also enjoys fly fishing, golfing, and following Tar Heel athletics.

KELLY ROARK

Kelly has been a resident of Asheville since 1983. She graduated from Western Carolina University and in 1999 entered the financial services industry. While registered to practice as an advisor, Kelly's primary focus is in operations and office management for Paragon Financial, LLC.

Kelly and her husband, Matt, have two beautiful daughters, Kylee and Kenzie. In addition to spending time with her family she likes to travel and cook.

INDEPENDENCE POWERED BY LPL FINANCIAL

Paragon Financial, LLC, is backed by the resources of LPL Financial, the nation's largest independent broker/dealer.* This relationship provides us with industry-leading, unbiased research and a comprehensive array of tools, resources and technology. Because LPL Financial has no proprietary products to sell, we have the freedom to offer you objective financial guidance and investment recommendations.

It would be our pleasure to discover your needs and help you live the life you envision. If our commitment to providing personalized service and comprehensive wealth management, investment management and estate planning appeal to you, please call 828.232.0549 at your convenience to schedule a no-obligation consultation.

Paragon
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* As reported by *Financial Planning* magazine, June 1996–2011, based on total revenue.