

Focusing on the Client Relationship at *McNamara Financial Group*

BY MAUREEN KEYTE

PHOTOGRAPHY BY STACEY CRESCITELLI

Bucks County native Charles McNamara III started his career with a large firm, gaining expertise in all levels of financial services, consulting and wealth management, and eventually becoming a manager. While he enjoyed the industry, McNamara felt he would be more fulfilled working one-on-one with individual clients in a more relationship-based approach to financial planning.

In 2011, he founded McNamara Financial Group, where he serves as principal and owner along with other partners who have a combined total of 50 years experience in the financial services industry. The group sets itself apart by offering 100% independent services with no affiliation to companies that manufacture financial products.

“We feel a lot of other advisors base value on assets, where we base value on relationships,” explained McNamara. “We work for the client only, allowing us to avoid a commission-based sales system that can be fueled by corporate incentives to boost the sales of products.”

Exceptional customer service and individualized account management are the top priority at McNamara Financial Group.

“With innovative and secure wealth management technology software we can provide an up-to-date complete financial picture for our clients,” said McNamara. “We facilitate financial meetings multiple times a year to keep clients on track.”

Born and raised in Doylestown, McNamara has strong ties to the



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community and solid relationships with local families and business owners. As a part of the mission of focusing solely on the situation of each individual client, a new team member, Jonathan Childs, was recently added. A graduate of West Point and a former officer in the U.S. Army, Childs joined the financial services industry in 2013, and uses his expertise in helping both civilian and active-duty veterans in business and personal services. He is also active with local community organizations like the Travis Manion Foundation.

Through the years, McNamara Financial Group has grown considerably,

but continues to offer a personalized approach to financial planning, with high-level corporate expertise based in a boutique culture of client-based consulting.

“Everything we do is transparent, so the client knows up front about any fees, and we pride ourselves on the integrity of the services offered,” said McNamara. | **r**

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