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AVION WEALTH

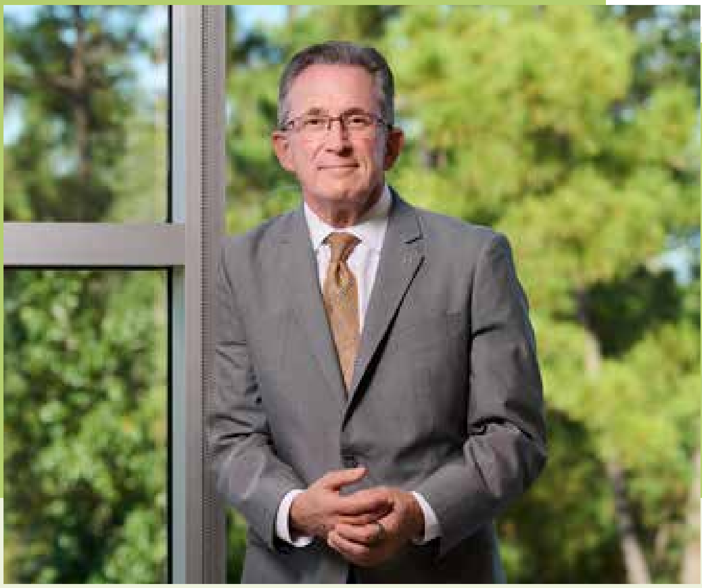

PHOTO BY **KARINA EREMINA OF JOY OF THE MOMENT PHOTOGRAPHY**

> We are more than just investment planners. We're here to help clients navigate the complexities of life, whether it's through planning major life events, coordinating with other professionals, or offering life coaching.

Your goals and dreams require more than ambition – they require strategic planning and smart financial decisions. At Avion Wealth, the experienced team is dedicated to helping you achieve those aspirations, offering the guidance and expertise to keep you on track.

In 2025, Avion Wealth will proudly celebrate its 20th anniversary. Over the years, Founder and Principal Partner Paul Carroll has grown the firm from a one-person operation to a team of 18 professionals, all focused on helping clients achieve their financial potential.

PAUL CARROLL'S JOURNEY

Paul's personal journey provides insight into the values that shape Avion Wealth today. Originally from Dublin, Ireland, Paul arrived in the United States at age 17 with just $200 and a toothbrush. Fast forward to today, and he now helps clients manage over $800 million in assets.

After earning his undergraduate degree and a master's in finance, Paul briefly served in the Air Force before joining a major investment planning firm. However, dissatisfied with the impersonal approach to financial planning, Paul took a different path. His entrepreneurial spirit led him to launch his own firm, initially focused on serving retired pilots. Since then, his firm has pivoted to successful business leaders. Even during the 2008 financial crisis, Paul's leadership and commitment allowed the firm to grow and evolve, expanding its reach across various industries. Today, that firm is Avion Wealth, where the team continues to refine its processes and deliver results for clients.

BEYOND INVESTMENT PLANNING

Avion Wealth stands apart by providing a holistic approach to financial management. Every member of the team is a fiduciary, acting in the best interests of their clients. They don't sell commission products – they focus on what matters most to their clients' financial success.

"We are more than just investment planners," says Paul. "We're here to help clients navigate the complexities of life, whether it's through planning major life events, coordinating with other professionals, or offering life coaching." Avion Wealth handles the details that could go overlooked, working to help every element of a client's financial plan align with their long-term goals.

The team at Avion Wealth takes pride in creating peace of mind for clients. From wealth management to working with outside experts to coordinate every detail, Avion Wealth affords clients the confidence that nothing has been missed.

For Paul, building Avion Wealth is about more than just growing a business – it's about leaving a legacy. He has cultivated a culture where the team works together toward a shared vision of excellence and success, both for their clients and for themselves.

Whether or not you already have a wealth management relationship, Avion Wealth offers a complimentary second opinion, providing valuable insights and referrals. It could be the first step toward a stronger financial future.

If you're seeking greater confidence in your wealth management, look to Avion Wealth – where your success is their priority.

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