



Paragon Tax Advisory Services Names Stephen Way as CEO and Angel Way as COO
Executive Employee Changes Announced

October 22, 2020 – Brunswick, OH – Paragon Tax Advisory Services announces Stephen Way as CEO and Angel Richelle Way as COO.

An industry veteran with over 30 years of experience, Stephen Way moves from President into the role of CEO to lead the company. As the CEO, Stephen will apply his tax planning and financial expertise to propel advisors' growth. Paragon Tax Advisory Services uses turnkey programs and in-house back-office resources that aim to expand financial advisors' business.

"I look forward to expanding and building upon the foundation Angel and I built. Our organization offers advisors and producers a turnkey model to deliver leads and provide a proven process," states Stephen Way, CEO. "This process creates a fully functional toolkit to attract tax and securities clients using compliant marketing tactics."

Angel Way moves from CEO to COO and will continue to manage operations at Paragon Tax Advisory Services. For the past seven years, Angel managed the organization's day-to-day activities. She also worked with Stephen to craft his vision into the Paragon infrastructure and build programs designed to help advisors change their lives.

In addition to her COO position, Angel leads Wealth Management Resources, LLC as Senior Financial Advisor and President.

"As COO, I'll continue to work with Stephen on building Paragon Tax Advisory Services and helping advisors breakthrough their income barrier and change their lives," said Angel Way, COO. "As President at Wealth Management Resources, I bring Paragon's back office and marketing resources to the forefront. These resources give investment advisory representatives the wealth management and trust planning tools they need to succeed in delivering value to their clients and facilitate the growth of their business."

Paragon Tax Advisory Services brings financial advisors the back-office resources they want to build their business, like a CPA, attorney, and investment advisors. Plus, they offer turnkey marketing programs advisors can tap into for growing their business. The marketing program resources provide quality leads, email drip campaigns, follow-up tools, and websites. Paragon Tax Advisory Services is highly compliant in all areas of

processing data and provides an all-in-one solution for advisors. For more information, call 844-952-7279.

About Paragon Tax Advisory Services

Paragon Tax Advisory Services provides financial professionals the research and back-office personnel to serve as their "single-source provider" for financial services and products. Paragon's platform unites qualified licensed professionals as a team. We teach our advisors that effective marketing in an ethical and compliant manner is possible. Our team can help an advisor achieve financial success and peace-of-mind through professional support. With Paragon Tax Advisory Services, advisors can plan from a tax-smart prospective. <https://paragontaxadvisory.com>

About Wealth Management Resources, LLC

Wealth Management Resources specializes in custom-fit wealth creation. It works with individuals and businesses to attempt to create highly customized, values-based investment strategies that reflect a client's personal goals and interests. Its unique approach to wealth creation integrates personalized investment strategies with tax planning strategies to attempt to maximize wealth creation in every portfolio.

<https://formywealthmanagement.com>

WealthShield Partners, LLC is an investment adviser registered with the SEC, DBA Wealth Management Resources. Registration does not imply a certain level of skill or training. More information about WealthShield Partners can be found in Form ADV Part 2 which is available upon request. Paragon Tax Advisory Services is not affiliated with WealthShield Partners.

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