Paul Litchfield

> What sets Paul apart from many other financial advisors is a combination of the following. Paul is a trusted fiduciary advisor who provides independent advice. He does not sell products and does not charge commissions to his clients.

Paul Litchfield is a fiduciary Wealth Advisor and Financial Planner at Claro Advisors, LLC. Paul puts clients' interests first and is passionate about helping them meet all their financial needs through comprehensive planning.

Paul provides one-stop shopping for his clients and advises them on investments, tax & estate planning, retirement planning, stock options, business advisory and anything else that touches their financial life. Paul adds value to his clients through many different life changes including, liquidity events, retirement, selling a business, death, divorce, a new job or contract and inheritance.

Paul started his investment career at Morgan Stanley and quickly figured out that the Wall Street model does not put clients first. That's why he moved to the independent fiduciary model, to ensure that his clients always come first.

Additionally, Paul provides 24/7 white glove service to his clients and they have a direct line of communication to him for all their questions. Unlike many financial advisors, Paul does not pass-off clients to junior staff members. He works with folks each step of the way from becoming a new client to managing the quarterly meetings for them.

Moreover, Paul is highly experienced in his field and has the credentials to prove it. He earned a Master of Business Administration (MBA) in finance and is also a certified public accountant (CPA). Being in his mid-30's, he is youthful enough to have the advantage of being able to work with his clientele, including their children and grandchildren, for many years to come. Most financial advisors, on the other hand, are near 60 years old which means they are probably thinking about their own retirement, not their clients' retirement.

Lastly, Paul has an outstanding team of professionally credentialed advisors supporting him and his clients. They include, two (2) certified financial planners (CFP), a chartered financial analyst (CFA), a professional plan consultant (PPC), a chartered retirement planning counselor (CRPC), a juris doctor (JD) and a Master of Laws (LL.M). The Claro staff also includes accredited investment fiduciaries (AIF).

Paul was instrumental in helping Claro Advisors develop into being named the 19th fastest growing RIA investment company in the United States in 2019 by Financial Advisor Magazine. Paul was also named a 2020 Five Star Wealth Manager. He is actively involved in his community and frequently volunteers at The Greater Boston Foodbank, The Pine Street Inn, and his local church among others. Paul is a private pilot and enjoys flying airplanes in his spare time.

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