

# A New Paradigm for Wealth Management.

 **PagnatoKarp**  
Transparent Family Wealth Advisors



“This prestigious award showcases the incredible teamwork from our firm, partners, and advisors as we continue to provide innovation and leadership to the families we serve.”

Paul Pagnato, CEO Founder

# MELDING SERVICES INTO A COMPELLING PACKAGE WORKS WELL FOR PAGNATOKARP

Paul Pagnato, CEO Founder of PagnatoKarp, talks to Tom Burroughes of *Family Wealth Report* on how it has hit the heights this year.

**What do you think is the main reason you have reached this award-winning stage? What sort of challenges did you have to take on?**

PagnatoKarp has created a new paradigm for wealth management by democratizing the family office. We offer a fusion of in-house services that have traditionally been available to very ultra-high net worth families and provide them to families with a much lower threshold of wealth. To make this possible, we have digitized, personalized and streamlined Intelligent Wealth Management™ through a fusion of services that include portfolio management, wealth strategy, tax, estate and legal, family governance, private banking, and lifestyle concierge.

**What can you tell us about how your colleagues contributed to this success?**

We are a boutique team of professionals focused on innovation, expertise, and high-touch/high-tech service. It has been a total team effort to achieve this level and earn this multi-family office award. We foster an entrepreneurial environment to drive value-creation while promoting a flourishing team culture.

**How have you dealt with the changes taking place in the North American wealth management market and in what way did your award reflect that?**

Our foundation is squarely based on transparency and True Fiduciary® standards - they are at the heart of everything we do. We are also proud of our flexibility. When the pandemic changed our world as we know it, we were able to turn on a dime and provide the same level of service virtually to our clients while adding increasingly enhanced value.

**From whom do you take inspiration, either in terms of people or other organizations, inside or outside the North American wealth sector?**

We take inspiration from leaders who are exponential thinkers and businesses focused on exponential technologies. Industries include artificial intelligence, cybersecurity, longevity, neuroscience, genomics, blockchain, finance and academia. Leaders include Elon Musk, Richard Branson, Bill Gates, Jeff Bezos, Peter Diamandis and Salim Ismail.

**What sets you apart from your peers this year?**

It is our ability to offer "aspiring billionaires" services that they might not otherwise be able to tap into at their current level of wealth. We specialize in entrepreneurs, wealth creators, business owners and CEO founders on the path to financial freedom.

**What will you do to keep to the standard of an award-winner and push ahead in the future?**

Wealth means more than just money. We have the flexibility, resources and vision to continue pushing the family-office threshold level to a lower and lower asset entry point without sacrificing quality of service. At the same time, we are finding new ways to help simplify complexity for the families we serve.

**What do you hope will be the main consequence of achieving this accolade?**

We are building the foundation of a new paradigm with an MTP (Massive Transformative Purpose) to positively impact one million lives through transparency. Our goal is to achieve our MTP, and our position is further strengthened through the recognition and accolades our firm has achieved.

**How will you use the award to raise your profile in the industry and among clients?**

The *Family Wealth Report* award has definite cache and is well known in the industry and to our clients. We prominently display our award credentials on our website, press releases, social media, articles, marketing materials, offices, and everywhere we can. We are truly grateful to be named *Best-Multi Family Office*. Thank you! ■

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