About our team

Our primary focus as a team is to deliver our very best to each and every client. We are dedicated to being the trusted team you turn to for wealth management guidance and perspective in any market condition.

Integrity
Integrity demands honesty and candor. We place the integrity of the investment profession and the interests of clients above our own personal interests.

Compassion
Our team's authentic compassion and concern allow us to guide you through your most important financial decisions.

Experience
We are loyal advocates and experienced wealth managers who continually challenge ourselves to achieve excellence in all areas of our work. Collectively, we hold the highest industry credentials.

Collaboration
We collaborate with you, your family, your CPA and your attorney to create effective and efficient financial strategies tailored to meet your goals.

Trust
We do not believe in taking shortcuts, nor do we dismiss any effort—large or small—if it is to your benefit. Responsiveness builds trust.

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Megan MacGowan, CFA, CFP®
Alison McEntee

Preserving, enhancing and perpetuating your wealth

Our team

We recognize that every client situation and family is unique. We work closely with each of our clients to understand their entire picture and assist them in making better financial decisions that are consistent with their goals and values. Our team explains our approach and recommendations with clarity. In our plans, we prepare for the unexpected and guide our clients through the challenges that come with varying market conditions.

Most of our clients are multi-generational relationships. We have navigated them through wealth accumulation, education & retirement funding, distributions, and inheritance. Over the course of our careers, our team has successfully transitioned hundreds of clients from accumulation to retirement income distribution. Ongoing communication to review blind spots and adjusting when necessary is critical in maintaining financial independence. Our ultimate goal is for our clients to achieve a financially stress-free retirement allowing them to focus on the more important things in life.

Megan's commitment to delivering her best has led to her being recognized by:
– *Forbes* America's Top Next Generation Wealth Advisors, 2018 – 2021
– *Forbes* America's Top Women Advisors, 2020, 2021
– UBS Rising Advisors, 2021
– UBS Top 35 Under 35, 2017, 2018

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Areas of Focus
– Custom financial/retirement planning and educational funding
– Asset allocation and individual investment portfolio construction
– Personal cash flow evaluation and guidance
– Advanced wealth preservation and gifting strategies
– Cross collaboration with clients' external advisor network (attorneys, accountants, etc)

Wealth Management Philosophy
For almost 20 years, Megan's tireless work ethic and positive attitude have kept clients focused on their long-term goals. She believes that true wealth management is about providing thoughtful, comprehensive solutions based on extensive knowledge and experience that deliver real value to our clients. Her attention to detail assures that every aspect of our clients' financial picture has been fully reviewed.

Credentials and Credibility
As a seasoned financial professional holding both CFA® and CFP® designations, Megan is part of an elite group of 1% of all financial advisors in the United States. Megan has earned and continues to maintain these designations by completing rigorous education and experience requirements.
– CERTIFIED FINANCIAL PLANNER™ (CFP®): CFPs help clients set and pursue financial goals while being held to the highest ethical and professional standards in the industry. CFPs are required to put your financial interests ahead of their own.
– Chartered Financial Analyst (CFA®): CFAs specialize in advanced investment analysis, portfolio management and risk evaluation.
– FINRA Series 7, 31, 66 securities licenses
– Life and variable annuity insurance licenses
– M.B.A. in financial evaluation/investment management, Lynn University
– B.S. computer management systems and business management, Lynn University; magna cum laude
– Member of Sigma Beta Delta

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Areas of Focus
– Proactive client account maintenance and administration
– General banking services execution, including money wires and cashier's checks
– Online banking services support, including Social Security auto deposit and online bill payment setup
– Client outreach, including IRA distributions and contributions
– New client orientation and onboarding
– Organization and preparation of financial documents for team review

Wealth Management Philosophy
Fully embracing the team's guided principles and client focus, Alison views exceptional service as her top priority. She places equal importance on client issues and concerns, consistently seeing them through to completion. An effective communicator, she consistently follows up with our clients to strengthen the relationship and build trust. She works closely with Megan preparing client reviews, financial plans and portfolio proposals. She is appreciated for her warmth, thoughtfulness and dedication.

Credentials and Credibility
With over a decade of experience in the financial services industry, Alison enhances our client relationships by providing valuable insights and knowledge needed to serve our clients in a professional and timely manner. Alison continues to be a high-achieving member of our team, gaining deeper knowledge about the different facets of our practice.
– M.B.A. marketing, Lynn University
– B.S. business administration, Lynn University; summa cum laude
– FINRA Series 7 and 66 securities licenses
– Member of Sigma Beta Delta
– 4-year starter and scholarship student-athlete with appearance in NCAA Sweet Sixteen, Varsity Women's Soccer