

FINANCIAL SERVICES REVIEW

FINANCIALSERVICESREVIEW.COM



PARAMOUNT ASSOCIATES WEALTH MANAGEMENT

CULTURE, CARE
AND A FOCUS ON
HUMAN-CENTERED
WEALTH
MANAGEMENT



Scott Tremlett,
CEO and Chief Investment Officer





Paramount Associates Wealth Management

*This award is in recognition of **Paramount Associates Wealth Management's** stellar reputation and trust among customers and industry peers, evident in the numerous nominations we received from our subscribers. **Paramount Associates Wealth Management** emerged as the **Top Financial Planning and Investment Management Service 2025** after an exhaustive evaluation by an expert panel of C-level executives, industry thought leaders, and our editorial board.*

Awarded By
FINANCIAL SERVICES REVIEW
ISSN 2835-9771



PARAMOUNT ASSOCIATES WEALTH MANAGEMENT

CULTURE, CARE AND A FOCUS ON HUMAN-CENTERED WEALTH MANAGEMENT

By Jeff Rodriguez

The most challenging financial decisions aren't just about markets. They're shaped by life itself: aging parents, changing family dynamics, unexpected career turns, health scares, and shifting priorities, all unfolding alongside economic and market forces. These moments, layered with emotion and urgency, introduce a kind of complexity that can't be captured in a spreadsheet or solved with a preset model. Yet that's exactly where most financial advice begins and ends.

In an industry still dominated by generic portfolio strategies and passive rebalancing, too many firms respond to life's financial questions with templated answers. They send out quarterly statements without context, offer asset allocations without explanation, and treat client relationships as scalable transactions. What's missing is nuance and trust.

Paramount Associates Wealth Management was built to fill that gap.

The boutique advisory firm is in the business of managing wealth to help people make decisions in the face of uncertainty. With an approach rooted in transparency, education, and adaptability, Paramount Associates stands apart

in a field that too often treats people like data points. Its advisors understand that clients bring complicated realities, and that good financial strategy must adapt to both the market and the moment.

Where others lean on automation and one-size-fits-all models, Paramount delivers a highly customized approach, backed by a proprietary global ranking algorithm and hands-on portfolio construction. But its real distinction lies in the human side of the equation: the conversations, context, and clarity that help clients navigate financial choices with understanding and confidence.

Education is central to the firm's culture. It is woven into podcasts, briefings, newsletters, and one-on-one conversations. Clients are never left in the dark about how their money is being managed. Instead, they are kept close to the process, not as spectators, but as informed partners.

“

As a tight-knit team, everyone here stays informed about our clients and their situations. Clients aren't handed off to a single advisor. They gain the collective insight of our entire team. No matter who they speak to, they're met with clarity and care.

This philosophy of making education personal, clear, and deeply relevant extends beyond boardrooms and inboxes. It reaches into more intimate settings, like the dinner table. Paramount Associates hosts regular client dinners and lunch and learns that serve as both social gatherings and powerful learning moments. At these events, CEO and Chief Investment Officer Scott Tremlett delivers a comprehensive global market update, connecting the dots between macroeconomic shifts and each client's individual portfolio.

The goal isn't just to inform. It's to empower.

Clients are encouraged to attend at least two of these dinners and/or lunch and learns each year, reinforcing the firm's belief that financial confidence is rooted in understanding. It also reflects the firm's internal commitment to staying ahead, with ongoing education, certifications, and licensing that ensure the team is equipped to navigate whatever the market brings.

These dinners also reveal a culture that prioritizes human connection. The firm is different not only in the way investments are managed, but in the way people are valued.



Culture as a Competitive Edge

Paramount Associates' culture, both internally and externally, is rooted in mutual respect, collaboration, and a shared mission to serve with empathy and clarity. From the very first meeting, clients are treated like family. There are no handoffs, no junior staffers



taking over, and no impersonal phone trees. Every relationship begins with an in-depth discovery process to understand a client's goals, legacy plans, and financial position.

From that foundation, the team constructs a full lifetime cash flow analysis powered by Monte Carlo simulations and scenario modelling. This allows them to stress-test assumptions and create robust plans for a range of possible conditions. The initial phase also includes a review of insurance needs, estate planning gaps, and any relevant business strategies. What the client receives is a detailed roadmap covering the next eight years, along with an investment policy tailored to their specific goals.

“Every interaction is marked by warmth, patience, and genuine attentiveness. We bring a light touch to what can otherwise be a heavy, overwhelming topic. At Paramount Associates, financial planning isn't just a service. It's a human experience—thoughtful, approachable, and even enjoyable,” says Tremlett.



That people-first mindset carries over into how the firm operates behind the scenes. Office culture reflects the same values it offers clients: camaraderie, transparency, and consistency. The team bonds both in and out of the office through shared meals, concerts, and off-site experiences, which translate directly into stronger collaboration and better client outcomes.

“We don't believe in keeping clients in the dark. That's why we produce a podcast, host live market updates, and publish timely posts after major financial events. When clients are educated, they're confident—and that confidence leads to better decisions, even in volatile times.

Fridays are casual unless a client is visiting. The break room features arcade games. The organization maintains a flat structure built for real-time decision-making and cross-functional support. When employees are happy at work, they provide a better experience for clients. That's the philosophy driving the firm forward.

One Firm for Every Financial Need

Paramount Associates offers a complete suite of financial planning and wealth management services, designed to grow with clients at every stage of life. Its areas of expertise include retirement and income planning, portfolio management, estate and tax strategies, risk management, insurance solutions, business succession planning, and exit strategies for entrepreneurs.

But a comprehensive list of services isn't enough if the advice behind them is compromised. In an industry where financial guidance is often influenced by commissions, proprietary products, or sales quotas, objectivity can be difficult to find. Many firms are incentivized to promote certain solutions, leaving clients wondering whose interests are being prioritized.

That's why Paramount Associates follows a fundamentally different model. Operating independently and free from product affiliations, the firm does not earn commissions. This independence allows the team to deliver advice that is entirely client-centered and free from sales pressure, hidden agendas, or product bias.

Behind the scenes, the firm applies a proprietary 13-factor screening system to evaluate investment options across ETFs, mutual funds, and private investments. Every position is reviewed quarterly. If an asset fails the screen twice, it is removed. This disciplined and objective approach helps maintain a high standard of quality and consistency across all portfolios.

Collaboration That Leads to Smarter Outcomes

The firm's strength also lies in how it collaborates with clients. Unlike many advisory firms where professionals work in silos, Paramount's model is built for integration. Clients engage with different experts depending on their needs, whether it involves investment strategy, insurance, or long-term planning.

“As a tight-knit team, everyone here stays informed about our clients and their situations. Clients aren't handed off to a single advisor. They gain the collective insight of our entire team. No matter who they speak to, they're met with clarity and care,” says Codi Robirds, administrative coordinator.

This level of collaboration creates continuity and shared knowledge that is rare in the industry. One example of this model in action was during work with a multigenerational, family-run manufacturing company facing a complex succession plan. The

family struggled with unclear leadership roles, tax exposure concerns, and internal disagreements.

Paramount facilitated a series of group and individual sessions with family members to surface tensions and clarify roles. The firm designed a plan covering estate strategy, tax exposure, buy-sell agreements, and leadership mentorship. The result was a smooth, unified transition that preserved both the business and family relationships.

This type of outcome is the result of a deeply integrated approach, where expertise, empathy, and clear communication converge.

Learning That Never Stops

Education is another core value at Paramount Associates—both internally and externally. Team members continually invest in their credentials. Tremlett holds multiple certifications and is pursuing another. Christopher Coyle, financial advisor and marketing director, is preparing for the Certified Financial Planner (CFP) exam. Robirds recently achieved her Accredited Asset Management Specialist (AAMS) designation. Everyone on the team has completed certification in alternative investments, ensuring they are equipped to incorporate non-traditional assets when appropriate. This shared commitment to ongoing education reflects the firm's culture of constant growth—staying informed, innovative, and always striving to better serve their clients and each other.

“We don't believe in keeping clients in the dark. That's why we produce a podcast, host live market updates, and publish timely posts after major financial events. When clients are educated, they're confident—and that confidence leads to better decisions, even in volatile times,” says Coyle.

The culture of learning runs so deep that clients often bring their children to meetings, eager to pass on financial wisdom across generations. These conversations spark curiosity, build confidence, and create a foundation for lifelong financial literacy.

Service That Extends Beyond the Spreadsheet

Paramount Associates is also deeply embedded in the communities it serves. The firm actively supports causes like the Alzheimer's Association, Autism Speaks, Special Olympics Colorado, and Food for Thought. As active members of the Parker and South Metro Denver Chambers of Commerce, the team also builds strong ties with local businesses.

Through the Association of Financial Educators, the firm provides free educational sessions on budgeting, investing, and financial literacy. These range from interactive lessons for children learning financial basics to workshops for college students and women navigating life transitions.

This outreach reflects the same values that guide every client interaction: service, integrity, and connection.



Growth Without Losing Ground

Looking ahead, Paramount Associates is preparing for strategic growth. The firm will move to a new office in December, expand its involvement in charitable events, and make key hires to support its growing client base. The aim is to scale intentionally—while preserving the personalized, one-on-one service that defines its identity.

Quietly shaping that culture for over two decades is a principle Tremlett first encountered in the book *Integrity Selling*, which he continues to share with every new team member.

“It's about active listening,” he says. “Hearing what people want and need. We're not here to sell a product. We're here to build a relationship.”

Those words are not just a north star. They reflect how Paramount Associates operates every day. Through thoughtful conversations and carefully crafted strategies, the firm helps clients navigate their financial lives with clarity and care—while reinforcing a culture defined by consistency, trust, and meaningful human connection. **fs**



Paramount Associates Wealth Management



FINANCIAL SERVICES REVIEW
ISSN 2835-9771

ValleyMedia, Inc.
600 S ANDREWS AVE STE 405
FT LAUDERDALE, FL 33301

www.financialservicesreview.com

