

October 2016

## **“Nothing Endures but Change.” Heraclitus**

As we approach the end of 2016 the world is changing around us. By the time the year ends, the United States will have elected a new President, the UK will be that much closer to leaving the European Union, the markets will have been “up, down and sideways”, and the KC Royals will no longer be the reigning World Champions.

Closer to home, Paragon Capital Management will be in new offices by the time we ring in the New Year. During December, we will make the move from Suite 230 all the way . . . up to the 6<sup>th</sup> floor of our current building. We have been in our space for over ten years and are moving to a larger space to accommodate our anticipated growth for the next ten years.

As always, we appreciate when you stop by for meetings, or just to say “hi”. Now, you will have yet another reason to come by and share a conversation and a cup of coffee with us. We will let you know a specific move-in date as it approaches.

In conjunction with the office move we are also planning other significant changes at Paragon. They have already begun and will continue for the next twelve months (or so). In short, we are making the largest single investment in technology in the history of the firm. The purpose of this investment is to improve our Service, Security, and Stability.

### **SERVICE**

In order to serve you better, we need to provide more-timely, more robust, and more customizable information to you regarding your portfolios, and your entire financial situation. To accomplish that, we are converting our current portfolio accounting, portfolio reporting, and client relationship systems to an industry-standard, best-of-class integrated system. Please rest assured that the information will not change, but the format of some reports or communications may change.

In a perfect world, these changes would be eagerly anticipated, seamless, and readily embraced. In the real world, we realize that change is difficult. Please be forthright with us as you notice changes and provide feedback. Just as we will undergo training on the new system, and all of its capabilities, we will also provide guidance and a “heads up” to you before you see any new, different, and improved communications.

### **SECURITY**

One of the questions we hear most often is “is my information safe with you”? The short answer is, and always has been, “yes”. We currently have the highest level of physical, and electronic, security available for our systems (both hardware and software). However, we can achieve even higher levels of security by moving to a system that reduces the number of components that must work together and in order for us to do that, our current system requires changes.

Although we currently meet the technology security requirements of our regulatory bodies, the Securities & Exchange Commission (SEC) and the Financial Industry Regulatory Authority, Inc. (FINRA), we believe we can exceed their requirements by making these changes. It is our goal; it is our duty to you, to remain ahead of the curve when it comes to technology and data security.

### **STABILITY**

As you all know, we pride ourselves in providing consistent service to you. A major part of that consistency has been our people. We avoid turnover whenever possible, as we believe that longevity helps promote experience that leads to excellence in our work. Our partners and staff work hard every day to ensure that you receive the service you require. However, we sometimes wish that we could do even more.

To that end, a portion of our technology investment is dedicated to efficiency; not simply for the sake of “efficiency” or even cost savings, but for the express purpose of letting Paragon focus on your higher priority needs. Although you will never “see” this component of our investment, we are certain that you will reap the benefits daily.

We understand that change is difficult, often unsettling, and sometimes unpredictable. However, it is also necessary to provide the best possible service to you today, tomorrow, and for years to come. We trust that you understand, and support, the improvements we are implementing.

Again, thank you for your confidence in Paragon Capital Management; and please do not hesitate to contact us anytime about Paragon’s upcoming changes; or with any other concerns you may have.

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