# PARAGON CAPITAL MANAGEMENT, LLC

9200 Indian Creek Parkway Building 9 Suite 600
Overland Park, Kansas 66210 913-451-2254


## ADV PART II B

This brochure supplement contains information about the members named on this page. You have received a copy of our ADV Part II A and this supplement provides additional information about our firm. If you did not receive a copy of our ADV Part II A, or you have questions about the contents of this supplement, please contact us. Additional information about the members and portfolio managers can be found on the SEC's Web site at www.advisorinfo.sec.gov.


Paragon Capital Management Principles

Craig Novorr
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**Web Site**:

www.paragoncap.com

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**Craig Novorr**

- Principal since 2006; Managing Partner
- Year of birth: 1973
- Graduated University of Kansas in 1996, with BS in Business Administration
- Completion, Certified Financial Planning Professional Education Program, College of Financial Planning
  - Time required to complete program: 2 ½ years
  - 5 exams taken to complete the program
- Vice President and Portfolio Manager: UMB Bank, 1996-2006
  - Co-Managed UMB Scout Technology Fund and UMB Scout Growth Funds
- Current and past civic and agency board and leadership positions include:
  - Past President: Overland Park Rotary Club:
  - Previously Program Chair: Overland Park Rotary
  - KU Hillel: Past board member
  - Wilshire Homeowners Association: Past board member
  - Make a Wish Foundation; Walk for Wishes: Board Member
  - Hands & Hearts (an auxiliary of Children's Mercy Hospital) Past board member
  - Past member of endowment committee: Temple B'Nai Jehudah
  - Various children's programs including Cub Scout den leader and Youth Basketball coach.
  - KC Magazine: Best Personal Wealth Manager: 2007-2016
  - Rising Star KC Business Magazine: 2010

**Howard Jacobson**

- Founded Paragon Capital Management in October 1998: Principal
- Year of Birth: 1940
- Graduated University of Missouri in 1962, with BS in Banking & Finance
- Over 50 years' investment experience, including Executive Vice President, Portfolio Manager, and Director of Equity Research & Trading: UMB Bank Trust Investment Division, 1990-1998
- President: Midwest Region of Danka Business Systems, 1988-1990

**Howard Jacobson (continued)**

- President and Chief Operations Office: Electronic Business Equipment, 1981-1988
- E.F. Hutton & Company, 1962-1981: Account executive and Branch manager of tax sheltered investments.
- Current and past civic and agency board and leadership positions include:
    - Jewish Community Campus -- past President and current board member
    - JCC Association of North America vice Chair of the board and chair of the audit committee.
    - Friends of the Zoo—Board Member
    - Jewish Federation of Kansas City -- Past President, Vice President & Treasurer
    - Starlight Theater -- former board member
    - Jewish Vocational Services -- past Vice President & Treasurer
    - B'nai B'rith Youth Commission -- past co-chair
    - Heart Association of Kansas City -- past board member
    - Cancer Society of Greater Kansas City – past board member
    - Boy Scout Area Council – member of Executive Advisory Board
    - Jewish Community Center –current board member and Past President, Vice President
    - Hyman Brand Hebrew Academy—President of the Foundation
    - Hyman Brand Hebrew Academy-Board member
    - Arts Council of Kansas City – past board member
    - Shawnee Mission Medical Center- Institute for Spirituality in Health – past board member
    - Friends of UMKC Conservatory of Music – Board member
    - Heritage Foundation – past Vice President and Board Member
    - Jewish Community Foundation of Kansas City – past Vice President and former board member
    - Polsky Family Foundation – past treasurer and board member
    - City of Fountains –Kansas City—past board member
    - United States Air Force Reserves – 442nd Troop Carrier Wing 1962 to 1968
    - Served on several private business boards
    - KC Magazine: Best Personal Wealth Manager

**Ward Williams**

- Principal since 2000
- Year of Birth: 1961
- Graduated Trevecca Nazarene College in 1983 with BS in Business Administration
- Over 30 years' investment experience, including Vice President, Portfolio Manager, and Investment Analyst for UMB Bank, Robert H. Murray Partners, and his own firm
- Director of Institutional Markets: Security Benefit Group
- Member of President's Advisory Council, Nazarene Theological Seminary
- Current and past civic and agency board and leadership positions include:
  - Past Board Member for several faith-based and autism organizations
  - Active volunteer at children's schools
  - KC Magazine: Best Personal Wealth Manager

Disciplinary Actions

We are registered with the SEC and one of their requirements is the disclosure of any legal or disciplinary measures taken against any portfolio manager within the last ten years. None of our portfolio managers has had a legal or disciplinary event occur within the last ten years or at any time previous to that.

Other Business Activities

Our portfolio managers do not engage in other business activities that would involve the payment of a salary or commission. They do however, participate in many investment related and/or charitable organizations. We strongly believe in contributing to our community through our involvement in charitable organizations and activities in addition to staying abreast of investment related professional developments. We have outlined that information for each principal in the firm as shown above and can give you more information about any of those activities.

Additional Compensation

The continued success of our business is based on good relationships with our clients, meeting their goals, and respecting their risk tolerance and income needs. Our priority is to serve our clients and retain their business. To be a successful firm, we also need to "grow" our business and reward our principals for new accounts brought in each year. By meeting their own new business goals, each portfolio manager can increase their income earned though a bonus program set up by us. This program in no way changes how portfolios are managed but does encourage new business efforts by everyone in our firm.

Supervision of Investment Managers:

The advice given to our clients by Paragon's members is reviewed through reports and regular investment committee meetings which are attended by all members of the firm.

Our Managing Partner, Craig Novorr can be contacted at any time as we are always interested in providing the best of service to all our clients. If you have any questions about the management of your account, Craig can be reached by phone, mail, or email.

Craig Novorr, Principal/Managing Partner
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