PARAGON CAPITAL MANAGEMENT, LLC

April 2019

Spring has Sprung!

After a long, cold, and icy winter it seems as if Spring has finally arrived in Kansas City. The temperature is rising, the sun is shining, and the pollen is in the air. Just as the seasons change, so does a business. So, as you are enjoying the warmer weather let us tell you about some exciting changes at Paragon Capital Management.

First, some of you may have already met Alexis Petersen at the front desk. Alexis comes to us from Bank of America and is usually our primary contact when clients come to the office or call us. She is also an administrator who handles money movements, account changes, and various other tasks associated with keeping track of your accounts. In short, if you have a question about your account, Alexis is the person to ask and she will either take care of your request or find the right person to do so.

Alexis earned her Bachelor's degree from the University of Missouri at Kansas City. She is a Kansas City native who enjoys spending time with her three dogs.

Second, Gene Pal joined us this year as a Wealth Advisor and Planner to focus on providing Paragon clients trusted guidance and assistance with addressing their unique financial concerns, needs and goals. Gene regularly consults on financial planning, retirement planning, wealth and asset management and preservation strategies, estate and/or gift planning, charitable gift planning, tax planning and trust administration. His expertise in these areas have been honed over his 30+ years of service in the finance, legal and personal trust world that has included engagements as a senior trust officer with three Kansas City-based bank trust divisions during which he was honored to be one of just a handful of Trust Officers recognized as a "Best in Client Service" Wealth Manager over a number of years.

Gene graduated from the University of Notre Dame with a Bachelor of Business Administration majoring in Finance in 1978; from Rockhurst University in 1981 with a Master of Business Administration, again majoring in Finance; and from the University of Missouri – Kansas City School of Law with a Juris Doctor. Professional accomplishments include his service to the Kansas City Estate Planning Symposium (2009 Chair and former Planning Committee member for 15+ years) and the International Association for Financial Planning – Greater Kansas City Chapter (Past President and former Board member).

Alexis and Gene are both in our Overland Park office, which implies that we have more offices now. That is correct. We now have offices in Oklahoma City and Dallas for the convenience of our clients, and prospective clients, in those areas.

Oklahoma Office (by appointment only)
1000 W Wilshire Blvd
Suite 306
Oklahoma City, OK 73166
705-246-9632

Texas Office (by appointment only)
4100 Spring Valley Rd
Suite 653
Dallas, TX 75244
972-674-4578

CLIENT PORTAL

Finally, we have recently rolled out our new Client Portal website. It is a password-protected, secure website where you can access your account holdings, balances, returns, and other data at your convenience; even on a daily basis if you wish. It's easy to sign up, just give us a call at the main number, 913-451-2254. Also, please feel free to ask us for training on how to sign in, view and understand the Client Portal. We would be happy to sit down with you one-on-one and teach you how to use it.

Those are quite a few changes at Paragon over the last several months. We believe that each of them will enhance your understanding of your account with us. As always, if you have any other questions feel free to call us.

Ward, Craig and Howard

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Wealth Management with a Unique Focus {you}!

Quarterly Reports
We have received positive feedback from our recent format changes. However, we understand that there is still some uncertainty regarding certain sections of the new report. We are always happy to sit down with you, or schedule a phone call, to explain the report in greater detail. If you think this would be helpful, please let us know.

In the ongoing effort to continue to give our clients the most detailed, and meaningful, data available, you may have noticed that your Schwab statement now includes, within the detail sections, cost basis information on your individual securities. Although this is information which we provided to you on an ongoing, quarterly basis in the past, it is now available on your custodial statements. We trust that you find it useful. A copy of our SEC Brochure (formerly Form ADV Part II) is available at any time. This document describes who we are, what we do, and how we do it. Also, our Proxy voting policy is available to you at any time. If you would like to receive either of these documents or inquire as to how your shares have been voted, please contact us at a phone number, or e-mail.