

J.M. EGAN

WEALTH ADVISORS LLC



1.800.919.5010
jmegan.com

Twenty One Green Village Road Madison, NJ 07940
2150 Highway 35, Suite 250, Brook 35 Plaza Sea Girt, NJ 08750
48 Wall Street, Eleventh Floor, Suite 1100, New York City, NY 10005

Investment Advisory Services offered through J.M. Egan Wealth Advisors, LLC and Securities offered through Securities America, Inc.
Member FINRA/SIPC. John M. Egan, CFP representative. • Securities America, Inc. and J.M. Egan Wealth Advisors, LLC are independent non-affiliated entities.

Please remember to contact J.M. Egan Wealth Advisors, LLC, if there are any changes in your financial situation or investment objectives, or if you wish to impose, add or to modify any reasonable restrictions to our investment management and advisory services. A copy of our current written disclosure statement discussing our advisory services and fees continues to remain available for your review upon request.

J.M. EGAN

WEALTH ADVISORS LLC



“I founded J.M. Egan Wealth Advisors, LLC more than twenty five years ago to provide comprehensive financial and wealth planning for individuals and families. Today, J.M. Egan Wealth Advisors, LLC serves over 300 families in 15 states.”

John M. Egan, CFP® / Owner

Investment Advisory Services offered through J.M. Egan Wealth Advisors, LLC and Securities offered through Securities America, Inc. Member FINRA/SIPC. John M. Egan, CFP representative. • Securities America, Inc. and J.M. Egan Wealth Advisors, LLC are independent non-affiliated entities.

Please remember to contact J.M. Egan Wealth Advisors, LLC, if there are any changes in your financial situation or investment objectives, or if you wish to impose, add or to modify any reasonable restrictions to our investment management and advisory services. A copy of our current written disclosure statement discussing our advisory services and fees continues to remain available for your review upon request.

J.M. EGAN

WEALTH ADVISORS LLC



Why Hire J.M. Egan Wealth Advisors?

- Full Service Wealth Advisory Firm
- Experienced in Retirement, Estate, Investment, Tax and Insurance Planning
- Specialists in handling large company retirement packages and employee benefit plans
- Objective advice with individual attention to each client
- 25 years in business serving more than 300 families
- Two offices to serve you
- Work with Accounting, Legal, and Banking officials
- Our commitment to confidence and trust



Investment Advisory Services offered through J.M. Egan Wealth Advisors, LLC and Securities offered through Securities America, Inc.
Member FINRA/SIPC. John M. Egan, CFP representative. • Securities America, Inc. and J.M. Egan Wealth Advisors, LLC are independent non-affiliated entities.
Estate Planning offered in conjunction with third party attorney.

Please remember to contact J.M. Egan Wealth Advisors, LLC, if there are any changes in your financial situation or investment objectives, or if you wish to impose, add or to modify any reasonable restrictions to our investment management and advisory services. A copy of our current written disclosure statement discussing our advisory services and fees continues to remain available for your review upon request.

J.M. EGAN

WEALTH ADVISORS LLC



J.M. Egan Wealth Advisors, LLC

List of Services

Financial Planning

- Wealth Accumulation Strategies
- Pension Rollover Planning
- Retirement Planning
- Tax Planning
- Retirement Income Planning
- Cash Flow Analysis

Estate Planning

- Wealth Preservation
- Wealth Transfer to Heirs
- Estate Distribution Planning
- Gift Strategies
- Trust Review (referral)
- Wills, Power of Attorney,
Health Care, Living Wills (referrals)

Investment Management

- Asset Allocation Portfolios
- Managed Portfolios
- ETF Portfolios
- Mutual Fund Portfolios
- College Savings (529) Plans
- Variable Annuities
- Roth IRA Planning
- Certificates of Deposit (Bank CDs)

Additional Services

- Divorce Financial Planning
- Legacy Planning
- Mortgage Referrals
- Risk Management
- Business & Succession Planning
- Social Security Planning



Investment Advisory Services offered through J.M. Egan Wealth Advisors, LLC and Securities offered through Securities America, Inc.
Member FINRA/SIPC. John M. Egan, CFP representative. • Securities America, Inc. and J.M. Egan Wealth Advisors, LLC are independent non-affiliated entities.
Estate Planning offered in conjunction with third party attorney.

Please remember to contact J.M. Egan Wealth Advisors, LLC, if there are any changes in your financial situation or investment objectives, or if you wish to impose, add, or to modify any reasonable restrictions to our investment management and advisory services. A copy of our current written disclosure statement discussing our advisory services and fees continues to remain available for your review upon request.

J.M. EGAN

WEALTH ADVISORS LLC



- Portfolio-Investment Management
- Tax Preparation and tax payment service
- Track and Monitor personal assets
- Bill pay auditing and financial purchase reporting
- Automobile purchase; maintenance; and testing for driving ability
- Track and monitor personal assets
- Estate-Will planning
- Oversight of elderly parents for out of state children
- Family member gifting programs
- Management of personal residence, including home maintenance, upkeep, and supervision of home contractors
- Multi-generational planning
- Personal Conceierge Services

Services priced on a combination of a fee for assets under management and fee for services rendered

Investment Advisory Services offered through J.M. Egan Wealth Advisors, LLC and Securities offered through Securities America, Inc.
Member FINRA/SIPC. John M. Egan, CFP representative. • Securities America, Inc. and J.M. Egan Wealth Advisors, LLC are independent non-affiliated entities.
Estate Planning offered in conjunction with third party attorney.

Please remember to contact J.M. Egan Wealth Advisors, LLC, if there are any changes in your financial situation or investment objectives, or if you wish to impose, add or to modify any reasonable restrictions to our investment management and advisory services. A copy of our current written disclosure statement discussing our advisory services and fees continues to remain available for your review upon request.



Egan Kelpatrick

FAMILY • OFFICE

- Portfolio-Investment Management
- Tax Preparation and tax payment service
- Track and Monitor personal assets
- Bill pay auditing and financial purchase reporting
- Automobile purchase; maintenance; and testing for driving ability
- Track and monitor personal assets
- Estate-Will planning
- Oversight of elderly parents for out of state children
- Family member gifting programs
- Management of personal residence, including home maintenance, upkeep, and supervision of home contractors
- Multi-generational planning
- Personal Concierge Services

Services priced on a combination of a fee for assets under management and fee for services rendered

Investment Advisory Services offered through J.M. Egan Wealth Advisors, LLC and Securities offered through Securities America, Inc. Member FINRA/SIPC. John M. Egan, CFP representative. • Securities America, Inc. and J.M. Egan Wealth Advisors, LLC are independent non-affiliated entities. Estate Planning offered in conjunction with third party attorney. Estate and tax planning offered in conjunction with third party attorneys and CPAs.

Please remember to contact J.M. Egan Wealth Advisors, LLC, if there are any changes in your financial situation or investment objectives, or if you wish to impose, add or to modify any reasonable restrictions to our investment management and advisory services. A copy of our current written disclosure statement discussing our advisory services and fees continues to remain available for your review upon request.

J.M. EGAN

WEALTH ADVISORS LLC



John M. Egan, CFP®
CERTIFIED FINANCIAL PLANNER™ professional

800.919.5010 ext. 323

john@jmegan.com

John M. Egan, CFP® is a CERTIFIED FINANCIAL PLANNER™ and President of J.M. Egan Wealth Advisors, LLC. John founded J.M. Egan Wealth Advisors, LLC more than twenty five years ago to provide comprehensive financial and wealth planning for individuals and families. Today, with John's leadership, J.M. Egan proudly serves over 250 families in 15 states. John holds various security licenses, a life/health insurance license and is a Registered Investment Advisor Representative.

John was raised in West Orange, New Jersey and attended Seton Hall Preparatory School. He earned his BA in Business Administration from Saint Michael's College in Winooski, Vermont. John holds the Certified Financial Planner designation of CFP from the College for Financial Planning in Denver, CO. John is a member of many professional organizations including the Financial Planning Association and Society of Financial Service Professionals.

John is involved in the community in many ways. He is past President of the Madison Chamber of Commerce, and a former member of the Downtown Development Commission, and the Madison Historic Preservation Commission. Currently John serves on the Morristown-Bear School Board of Trustees. He is a former member of the Business Advisory Board of Hilltop Community Bank of Summit, New Jersey. John remains involved in numerous charitable organizations.

John lives in Madison, New Jersey with his wife, Susan. Their son, Brian, graduated from Fairfield University and now lives and works in New York City. Their daughter, Kelsey, recently graduated from Elon University and also lives and works in New York City. John's interests include spending time with his family, tennis, boating, skiing, relaxing at the Jersey Shore, and renovating his historic home.

Investment Advisory Services offered through J.M. Egan Wealth Advisors, LLC and Securities offered through Securities America, Inc. Member FINRA/SIPC. John M. Egan, CFP representative. • Securities America, Inc. and J.M. Egan Wealth Advisors, LLC are independent non-affiliated entities.

Please remember to contact J.M. Egan Wealth Advisors, LLC, if there are any changes in your financial situation or investment objectives, or if you wish to impose, add or to modify any reasonable restrictions to our investment management and advisory services. A copy of our current written disclosure statement discussing our advisory services and fees continues to remain available for your review upon request.

J.M. EGAN

WEALTH ADVISORS LLC



Daniel J. Field, CFP®

Phone: 800-919-5010

Wealth Advisor
daniel@jmegan.com

Daniel joined J.M. Egan Wealth Advisors, LLC to assist in providing exceptional advice and service to our clients. He grew up in Lafayette, NJ and is the youngest of three children. Daniel graduated from Pennsylvania State University in 2003, with a Bachelor of Science degree in Finance. Recently he obtained the Certified Financial Planning certificate (CFP).

Previously, Daniel held the position of Financial Analyst with a financial advisor firm for over 7 years. He and his wife, Kate, along with their two dogs, Riggs and Marley, live in Wharton, NJ. Daniel enjoys all outdoor activities especially hiking, competing in triathlon races and spending time with his family and friends.



Nicholas Minton

Phone: 800-919-5010

Client Service Associate
nick@jmegan.com

Nick joined J.M. Egan Wealth Advisors, LLC in October of 2015. Nick is the older of two children and graduated from DePaul Catholic High School in Wayne, NJ. He then went on to receive a Bachelor of Science Degree in Finance & Financial Planning from Saint Joseph's University in Philadelphia, PA. Nick is currently working towards becoming a certified financial planner. Nick's interests include attending Jets, Devils, and Mets games. He also enjoys traveling and going down to the Jersey Shore with his friends.



Jennifer Glogolich

Phone: 800-919-5010

Client Service Manager
jennifer@jmegan.com

Jennifer is a lifelong resident of Chatham and has been a member of J. M. Egan Wealth Advisors, LLC for 6 years. She and her husband, Pete, have three children, Matthew, Melinda and Michael. She recently became a grandmother and enjoys spending time with her family and her dog, Ozzy. Her other interests include vacationing in the Outer Banks, NC, cooking, reading medical thrillers, and visiting Atlantic City.



Melinda Glogolich

Phone: 800-919-5010

Assistant to John M. Egan, CFP®
melinda@jmegan.com

Melinda started with J.M. Egan Wealth Advisors, LLC in September of 2014. She is a lifelong resident of Chatham, NJ. Melinda graduated from Chatham High School and went on to attend the Institute of Therapeutic Massage. In her free time, Melinda enjoys traveling, any outdoor activity and spending time with her family.

Investment Advisory Services offered through J.M. Egan Wealth Advisors, LLC and Securities offered through Securities America, Inc.
Member FINRA/SIPC. John M. Egan, CFP representative · Securities America, Inc. and J.M. Egan Wealth Advisors, LLC are independent non-affiliated entities.

Please remember to contact J.M. Egan Wealth Advisors, LLC, if there are any changes in your financial situation or investment objectives, or if you wish to impose, add or to modify any reasonable restrictions to our investment management and advisory services. A copy of our current written disclosure statement discussing our advisory services and fees continues to remain available for your review upon request.

J.M. EGAN

WEALTH ADVISORS LLC



Easy Directions To Madison, New Jersey



FROM THE NEW JERSEY GARDEN STATE PARKWAY – NORTHBOUND

Stay to the far right of the Union Toll Plaza and take exit 142B for Route I-78 West. Take I-78 West to exit 48 for Route 24 West. Take Route 24 to exit 7A (124/Chatham). Proceed under highway and bear right. You are now on Main Street in Chatham. Take Main Street through ten sets of traffic lights. This will take you out of Chatham and bring you into Madison. At the eleventh traffic light make a left onto Green Village Road (the end of the Madison downtown business District). Proceed straight under the train trestle and through the next traffic light.

We are located at **21** Green Village Road, which will be just ahead on the right, across from St. Vincent Martyr Church.

FROM THE NEW JERSEY GARDEN STATE PARKWAY – SOUTHBOUND

Take Exit 142 for Route I-78 West to Route 24 to Exit 7A (124/Chatham). Proceed under highway and bear right. You are now on Main Street in Chatham. Take Main Street through ten sets of traffic lights. This will take you out of Chatham and bring you into Madison. At the eleventh traffic light make a left onto Green Village Road (the end of the Madison downtown business District). Proceed straight under the train trestle and through the next traffic light.

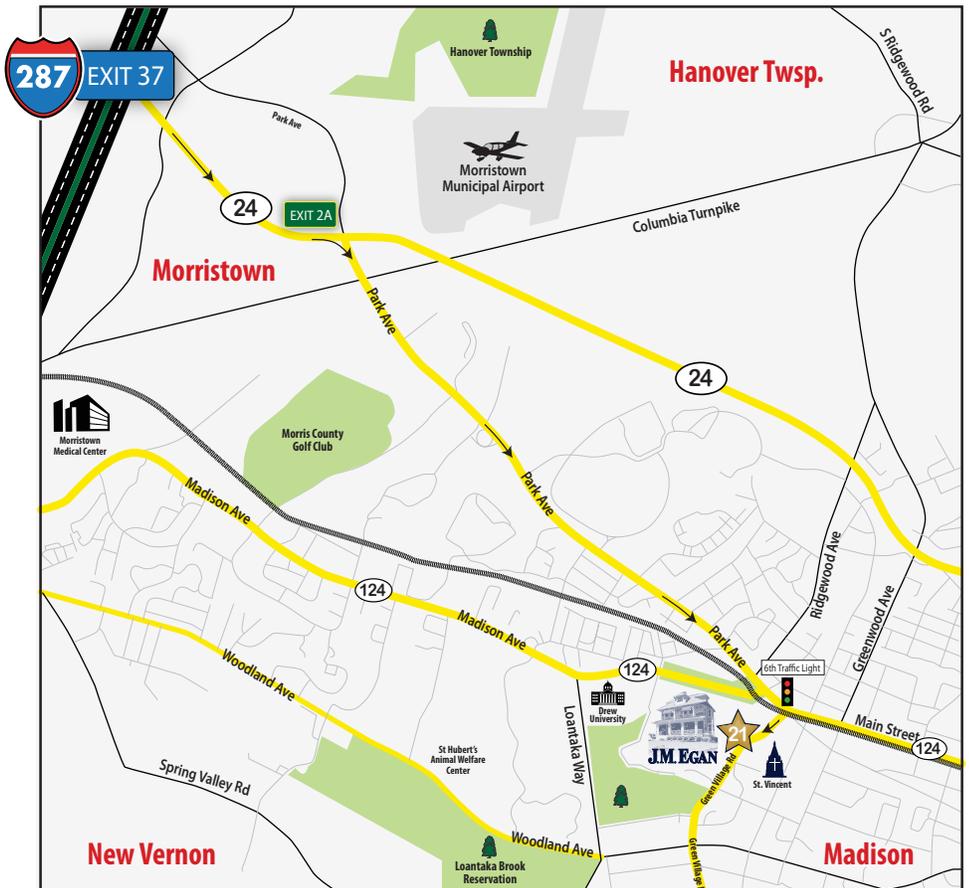
We are located at **21** Green Village Road, which will be just ahead on the right, across from St. Vincent Martyr Church.



FROM INTERSTATE ROUTE 287 – NORTH OR SOUTHBOUND

Take Route I-287 to Exit 37 (Route 24). Continue on Route 24 East to Exit 2A. Proceed down the off-ramp and up the hill to the next traffic light. Make a left at this light and onto Park Avenue. Take Park Avenue through the next five lights. Make a right onto Green Village Road at the sixth traffic light. Proceed straight under the train trestle and through the next traffic light.

We are located at **21** Green Village Road, which will be just ahead on the right, across from St. Vincent Martyr Church.



J.M. EGAN

WEALTH ADVISORS LLC



Twenty One Green Village Road
Madison, New Jersey 07940

Direct Phone Madison: 973-377-4700
General Office Phone: 800-919-5010

Investment Advisory Services offered through J.M. Egan Wealth Advisors, LLC and Securities offered through Securities America, Inc. Member FINRA/SIPC. John M. Egan, CFP representative. • Securities America, Inc. and J.M. Egan Wealth Advisors, LLC are independent non-affiliated entities.

Please remember to contact J.M. Egan Wealth Advisors, LLC, if there are any changes in your financial situation or investment objectives, or if you wish to impose, add or to modify any reasonable restrictions to our investment management and advisory services. A copy of our current written disclosure statement discussing our advisory services and fees continues to remain available for your review upon request.

J.M. EGAN

WEALTH ADVISORS LLC

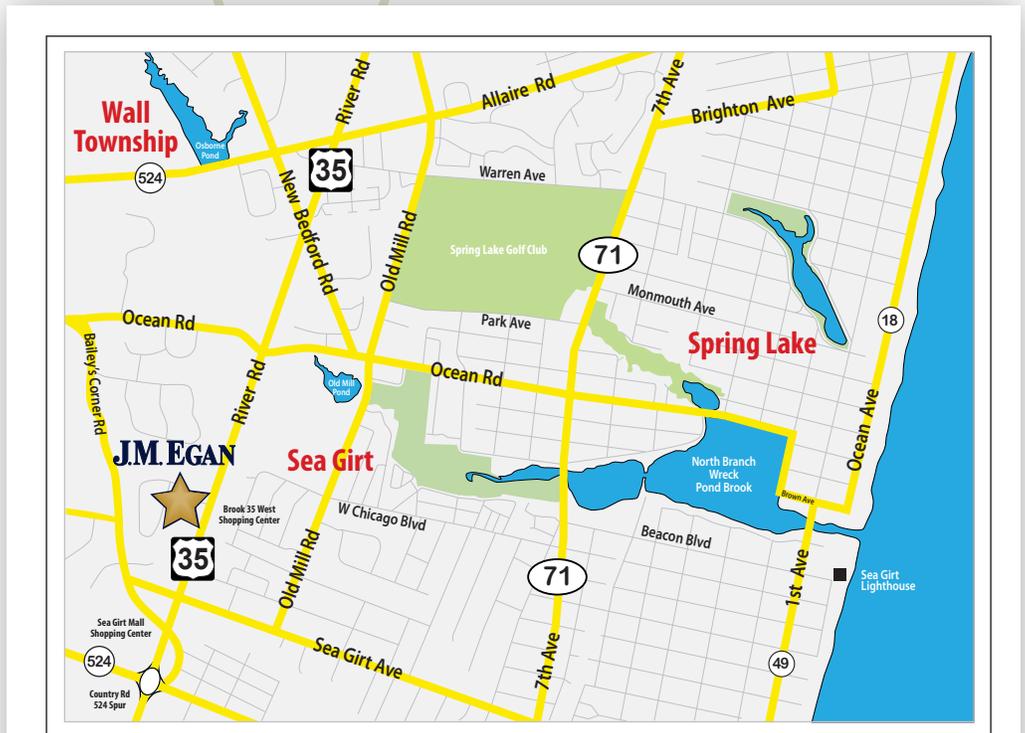


Easy Directions To Sea Girt, New Jersey



FROM THE NEW JERSEY GARDEN STATE PARKWAY

Take Exit 98 and follow Route 138 East. At the 3rd traffic light, turn right onto New Bedford Road. Go through 2 traffic lights to the Stop sign. Turn right onto Route 35 South. Brook 35 Shopping Plaza. is approximately 1 mile down on the left side.



J.M. EGAN

WEALTH ADVISORS LLC



2150 Highway 35, Suite 250
Sea Girt, New Jersey 08750

Phone: 800-919-5010

Please Note: J.M. Egan Wealth Advisors is located in the Brook 35 Shopping Plaza, Sea Girt, NJ. We are located to the left of Starbucks. Use the entrance closest to Banana Republic and take the elevator to the **second floor**. There is additional parking and an entrance in the rear of the building.

Investment Advisory Services offered through J.M. Egan Wealth Advisors, LLC and Securities offered through Securities America, Inc. Member FINRA/SIPC. John M. Egan, CFP representative. • Securities America, Inc. and J.M. Egan Wealth Advisors, LLC are independent non-affiliated entities.

Please remember to contact J.M. Egan Wealth Advisors, LLC, if there are any changes in your financial situation or investment objectives, or if you wish to impose, add or to modify any reasonable restrictions to our investment management and advisory services. A copy of our current written disclosure statement discussing our advisory services and fees continues to remain available for your review upon request.

J.M. EGAN

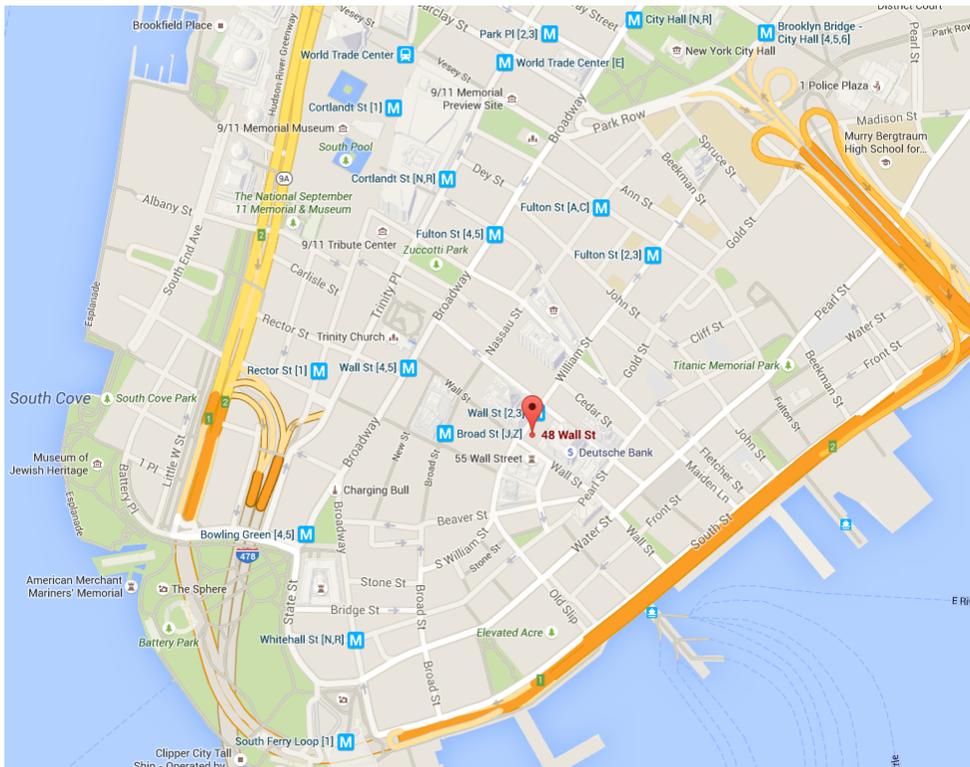
WEALTH ADVISORS LLC



Easy Directions To New York City at 48 Wall Street

FROM THE NEAREST SUBWAY STATION

Our building is conveniently located adjacent to the Wall Street Subway Station. The station is easily accessible using the New York City subway system on either the 2 or the 3 train.



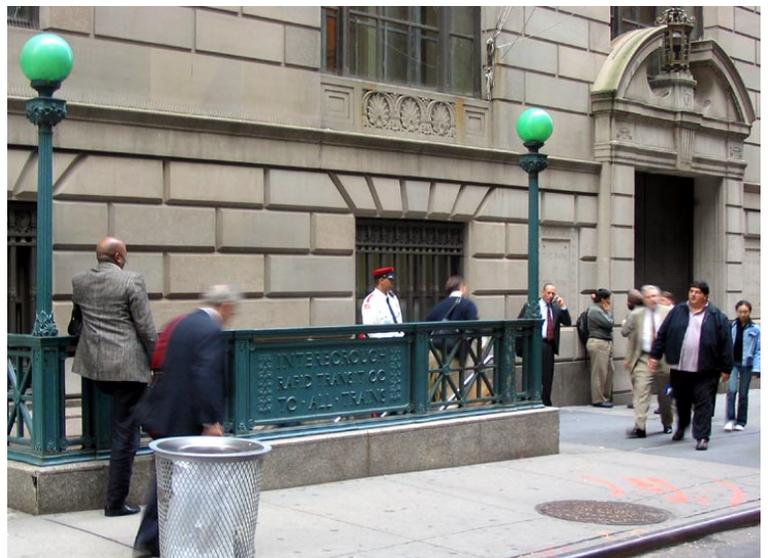
J.M. EGAN

WEALTH ADVISORS LLC



48 Wall Street, Eleventh Floor, Suite 1100,
New York City, NY 10005

New York City Office Phone: 212-918-4725
New Jersey Office Phone: 800-919-5010



Investment Advisory Services offered through J.M. Egan Wealth Advisors, LLC and Securities offered through Securities America, Inc.
Member FINRA/SIPC. John M. Egan, CFP representative. • Securities America, Inc. and J.M. Egan Wealth Advisors, LLC are independent non-affiliated entities.

Please remember to contact J.M. Egan Wealth Advisors, LLC, if there are any changes in your financial situation or investment objectives, or if you wish to impose, add or to modify any reasonable restrictions to our investment management and advisory services. A copy of our current written disclosure statement discussing our advisory services and fees continues to remain available for your review upon request.