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DETROIT FINANCIAL

White-Glove Wealth Management

Panos Firek Wealth Management of Raymond James delivers comprehensive, boutique wealth management to affluent and high net worth clients.

Gus Panos and Jason Firek had a clear vision when they launched their wealth management practice, Panos Firek Wealth Management, over 20 years ago: to know every client personally and provide the exceptional service that affluent and high net worth clients need and deserve.

"We specialize in tying all the facets of a client's financial life together into a comprehensive plan that works to achieve their goals," says Firek, CFP®, managing director, wealth management advisor, and partner. That comprehensive plan includes not only portfolio management and retirement planning but estate planning, insurance planning, and lending capabilities. "We enjoy being the quarterback to create plans that encompass all those facets."

The practice intentionally keeps a small handful of clients to dedicate ample time to each one. "We're selective about who we take on. We only have about 300 households in our practice, and this affords us the time to really do our job like we're supposed to," says Panos, managing director, wealth management advisor, and partner.

Gus Panos, Managing Director

Jason Firek, CFP®, Managing Director

ALWAYS IMPROVING

Over the years, Panos Firek Wealth Management's original vision to cater to a select and specific clientele has remained the same, but the tools and resources to execute that service have only become better.

About 10 years ago, the practice adopted a discretionary model of money management, empowering advisors to rebalance portfolios with more flexibility. A disciplined process keeps emotions in check, whether proactively weathering market storms or optimizing a good market run.

Six years ago, the team switched from its previous broker-dealer to join Raymond James—another decision made for the benefit of clients. "Before we switched, we didn't have the freedom to grow our practice or treat our clients the way we wanted," says Firek. "Raymond James gives us the independence to manage our business the way we see fit. They aren't pushing any products on us, but rather are truly focused on helping advisors better serve clients."

With a client-centric culture and state-of-the-art technology, Raymond James equips Panos Firek Wealth Management with access to the latest tools and techniques to deliver the best experience possible for clients and advisors alike. The practice's strong, experienced support staff—including Amanda Bell, Nancy Smith, Sierra Richardson, and Rachel Zavadil—is critical to achieving its white-glove service. "They are the best in the business, and clients truly appreciate the work they do," say Panos and Firek. Also, Financial Advisor Megan Ringwelski works closely with the team and brings ideas, energy, and talent to the practice and helps advise next-generation relationships.

HELPING DREAMS BECOME REALITY

"What's most rewarding for me is seeing our clients' plans come to fruition," says Panos. "They are so thankful for the planning that helped them achieve their goals, whether it was retirement, an estate plan, or a child's college education."

"It's that ability to really help people that gets us out of bed," Firek concludes. "We're doing something meaningful here."

FROM LEFT: Amanda Bell, Practice Business Manager; Gus Panos, Managing Director; Megan Ringwelski, CFP®, CDFA®, Financial Advisor, and Associate Vice President; Jason Firek, CFP®, Managing Director; Nancy Smith, Senior Registered Client Service Associate; John Gaynor, CRPC®, CPFA, CEPA®, Vice President of Wealth Management; and Sierra Richardson, Senior Registered Client Service Associate. Rachel Zavadil not pictured.

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