parisigray

WEALTH MANAGEMENT

THE POWER OF WALL STREET,

...personalized

Our Firm

For 30 years, our professionals have been providing financial advice and wealth management services to a select group of clients requiring sophisticated financial solutions. Our passion is providing specialized advice and highly personalized service for individuals and families who require confidentiality and discretion around complex financial situations.

Barron's has named our advisors to its prestigious list of "America's Top 1200 Financial Advisors" for six consecutive years (2012-2017). We have the experience to help our clients protect, grow, and transfer their wealth, regardless of the economic environment.

STRENGTH, STABILITY AND FOCUS

Safeguarding client assets is our top priority. We custody assets with Pershing Advisor Solutions, a BNY Mellon company. With over $30 trillion of assets under custody and/or administration, BNY Mellon is the largest custodian in the world and offers a wide array of banking and lending capabilities. As a Registered Investment Advisor, Parisi Gray advisors are consultative fiduciaries rather than product-pushing, retail bank salespeople. Wirehouse advisors prioritize shareholder profits. We prioritize *you*.

FINANCIAL CONSULTING AND PLANNING

Our **Wealth Foundation Report** serves as the foundation from which we create your personal financial plan and investment strategy. Using the goals-based approach to wealth management that we pioneered and have been using over the past twenty years, we conduct an in-depth analysis of your current financial situation and compare this with your financial and life goals. While our capabilities are as varied as our clients' needs, we propose solutions uniquely suited for your circumstances and objectives. We build you a personalized plan based on who you are; your values, your sources of wealth, your passions and pleasures, your views on inherited wealth, charitable contributions and foundations, and more. Our mission is to help you create a legacy that transcends wealth.

WHAT DISTINGUISHES PARISI GRAY WEALTH MANAGEMENT

We stay ahead of the curve by anticipating industry and market trends. Our investment process is disciplined and grounded, and has withstood the test of time. Since the 1980's, our team has navigated the nation's most profitable and most treacherous markets. We have the experience and track record to structure your investment portfolio and liquidity to match your financial and life goals, regardless of the investment climate.

Our Story

Founded by John Parisi, PGWM has its roots in Wall Street. After a successful career as an institutional bond trader at Merrill Lynch, John moved into Private Client Wealth Management to align work with his passion of protecting and building assets.

On departing Merrill Lynch, John, and his longtime partner David Gray, decided to establish PGWM in beautiful Bedminster, NJ, far from the distractions and ambitions of Wall Street bankers and product salesman. Bedminster is home to the United State Golf Association and the US Equestrian Olympic team, and is only 40 minutes west of Manhattan. While we routinely make “house calls” to clients worldwide, our Bedminster home provides the peace of mind and space to think independently and work with clients to achieve their goals, dreams and aspirations.

Our customized financial and investment management strategies allow our clients to focus on their careers and lives, with the knowledge that their wealth is being managed in direct alignment with their personal goals and values.

While we have numerous strategic partnerships with attorneys, trust officers, business managers, accountants, and other professionals, we work under a format of open architecture, which means that we actively coordinate with your preferred outside advisors. Whether it’s our network or yours, we are committed to creating and integrating a team that leverages elite services with historical knowledge and personal insights.

Our client demographics consist of household net worth ranging from a few million to a few hundred million, with relationships globally. The principals that founded Parisi Gray Wealth Management believe that personalized financial service is what makes our business rewarding — earning client trust over the years and working across all generations of a family.

Our Team

JOHN F. PARISI

MANAGING PARTNER
WEALTH MANAGEMENT ADVISOR
CERTIFIED INVESTMENT ANALYST

(973) 358-4922

jparisi@parisigray.com

DAVID P. GRAY

PARTNER
WEALTH MANAGEMENT ADVISOR
CERTIFIED FINANCIAL PLANNER ®

(973) 358-4923

dgray@parisigray.com

CHRISTINA M. SOFKA

CLIENT SERVICE MANAGER
CHIEF ADMINISTRATIVE OFFICER

(973) 358-4924

csofka@parisigray.com

DANIELA A. HOLMES

CLIENT SERVICE MANAGER

(973) 358-4925

dholmes@parisigray.com

PERSHING CLIENT SERVICE TEAM

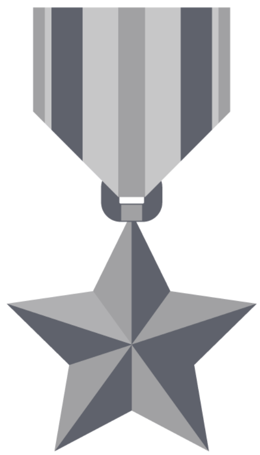
SEVEN MEMBER DEDICATED BACK-OFFICE SUPPORT TEAM IN JERSEY CITY, NJ

Distinctions & Awards

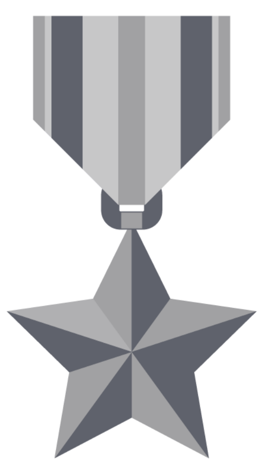
Our partners hold industry leading professional designations

Certified Financial Planner CFP
Certified Invesment Management Analyst
Certified Divorce Financial Analyst
Member Investment Management Consultants Association

We have been named to Barron's List of Top Financial Advisors in America for six consecutive years



Barron's America's Top 1000
Financial Advisors
2012, 2013, 2014



Barron's America's Top 1200

Financial Advisors

2015, 2016, 2017

Source: America's Top 1,200 Financial Advisors: State by State List, March 6th, 2017. For more information about the selection criteria go to www.barrons.com. Barron's is a trademark of Dow Jones & Co. Inc., All rights reserved)

Partners

BNY MELLON | PERSHING

ENVESTNET®

eMoney Advisor

Contact Us

We look forward to discussing more about your needs and welcome the opportunity to discuss RIA financial management with you.

Please call our firm at: **973-358-4921**

We are located at:
Parisi Gray Wealth Management, LLC
350 Main Street, Suite 1

Bedminster, NJ 07921
Get Directions

Send Us A Message

Name

Email

Message

SEND

parisigray

OFFICE:
Parisi Gray Wealth Management, LLC
350 Main St Suite 1
Bedminster, NJ 07921
Get directions
Phone: 973-358-4921
Email: jparisi@parisigray.com

Learn more about an advisor’s background on FINRA’s BrokerCheck