Trivium Point Advisory
+
PARADIGM FINANCIAL PARTNERS
+
Lyons & Lyons, CPAs

NEWS
For immediate release

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Trivium Point Advisory Announces Two Mergers and Rebranding Initiatives

Paradigm Financial Partners and Lyons & Lyons, CPAs join forces with Trivium, adopt Trivium name and mission

Westport, CT (January 10th) – Trivium Point Advisory (Trivium), an independently owned and operated financial advisory firm with offices in Fairfield County, Connecticut, and Westchester County, New York, today announced two mergers and corresponding rebranding initiatives. Both mergers solidify Trivium's position as a professional financial advisory firm dedicated to providing exceptional services to all clients.

PARADIGM MERGER

The first merger is Paradigm Financial Partners (Paradigm), an SEC Registered Investment Advisory firm with offices in Connecticut. Paradigm was recently named to Forbes Top RIA Firms of 2023. The combined teams will work together to provide faster and stronger support to a discerning clientele.

"We are excited to enter into this partnership with the Paradigm team," said George R. Gerhard, AIF®, CEPA®, Managing Partner, Trivium. "It is a true integration of two established wealth management organizations that allows for elevated experience and continuity."

Paradigm Managing Partner, Lee S. Rawiszer, added: "Change is necessary as the world of financial advice becomes increasingly complex. It is crucial to evolve and continue serving our clients in the most progressive way."

Bryan Staff, Managing Partner at Merchant Investment Management, LLC, also shared his enthusiasm by stating “We are delighted to see these two businesses come together to build a firm in the NY Tri-State area with comprehensive capabilities to serve their clients' needs. This combination represents a well-planned and well-executed merger of like-minded, multi-functional, and multi-custodial wealth management organizations and is a terrific illustration of the power and synergies within the Merchant ecosystem.”

CPA FIRM MERGER

Lyons and Lyons CPAs has also merged with Trivium, bringing a suite of tax services, including expert accounting, tax planning, and business consulting, to complement the full-service investment advisory and financial planning services being provided by the new and expanded Trivium wealth management teams.

David Lyons, CPA, owner of Lyons & Lyons, CPAs, expressed his enthusiasm for the merger stating, “As we combine our strengths with Trivium, we embark on a new chapter with even greater potential to serve our clients. Trivium will continue the legacy of personalized service and exceptional financial guidance that has made Lyons & Lyons a trusted name in our community.”

Ron Pac, AEP®, CFP®, ChFC®, RICP®, Managing Partner, Trivium, also shared his excitement: “We are delighted to welcome both teams from Paradigm and Lyons & Lyons into our family. Together, we will seek to further elevate our commitment to the community while expanding our services and capabilities to address the evolving financial needs of all our clients – all within one trusted brand.”

REFRESHED BRAND COMES AS PART OF MERGER SUCCESS

As part of the merger celebrations, Trivium unveiled a refreshed website, logo, tagline, and signature video. The name “Trivium” holds special significance: It is Latin for a crossroads or where three roads meet. In the context of client services, these three roads represent wealth management, tax and accounting, and business advisory services. The newly adopted tagline – “Clarity at Life’s Crossroads” – makes Trivium’s mission crystal clear. Visit the firm’s website to view the newly refreshed website, logo, tagline, and signature video online.

ABOUT TRIVIUM POINT ADVISORY

Trivium Point Advisory is an independently owned and operated financial advisory firm with four offices in Fairfield County, Connecticut, and Westchester County, New York. The firm is driven by a passion for delivering professional financial guidance and personalized services to individuals and businesses. Advisory services are offered through Trivium Point Advisory, LLC (Trivium). Securities are offered through LPL Financial (LPL). Trivium and LPL are not affiliated. Advisory services are only offered to clients or prospective clients where Trivium and its representatives are properly licensed or exempt from licensure. To learn more about how Trivium’s team of coordinated, tenured professionals helping clients find clarity at life's crossroads, visit www.TriviumPoint.com.