



Accelerated Timeline

**PAUL DELANEY HELPS RESEARCH
TRIANGLE EXECUTIVES ACHIEVE
FINANCIAL FREEDOM FASTER.**

“The Research Triangle creates immense opportunity for the technology and life sciences professionals based in our area,” says Paul Delaney, CFA®, CFP®, wealth advisor at Capital Endurance Group in Cary, North Carolina. “I specialize in helping executives and business owners reach financial independence faster through investing wisely, managing taxes effectively, and maximizing executive compensation plans.

“Clients come to me because they are experts in their chosen fields but not in wealth management, and they need specialized knowledge of executive compensation, tax-advantaged savings, investing, and estate planning to accelerate their timeline to financial freedom. They understand their choices today will determine what their future looks like in 20, 30, or 40 years.”

To ensure every client gets the personalized attention they need, Capital Endurance Group is structured differently from other firms. “First, our advisors are capped at 50 clients, which allows us to meet every client every quarter,” explains Delaney. “Second, client work is performed by the advisor rather than delegated to a junior employee—which is common at larger firms. Third, we’re a fiduciary advisor firm, which means we’re paid only by our clients, so we’re focused solely on finding the best solution for each client’s unique circumstances.”

CLIENT EDUCATION IS KEY

Delaney believes in the power of client education to maximize wealth management opportunities. “It’s my job to educate clients on the opportunities and pitfalls within life’s possibilities—while also identifying and managing the myriad risks that can undo a lifetime of hard work,” he explains. “We quantify the vision each client has for their future in a regularly updated financial plan. Clients then know how choices made today will impact the rest of their lives.”

ELEVATE YOUR PLAN

Delaney takes client education to the next level online, where he has created free resources including eBooks and videos on optimizing savings and investments. “I use my 15-plus years of Wall Street experience in money management and research to focus on what works in investing while screening out the rest,” Delaney says.

His video series, “ELEVATE Your Plan,” lays out the strategies critical to a successful retirement, showing viewers a step-by-step process for savings, investment, and taxes.

“Using 20 years of real data, I show estimates of the expected extra annual return on a typical prospective client’s portfolio,” explains Delaney. “This helps clients understand that just on the portfolio aspect of our service alone, we add value that is often multiples of our fee.”

FREEDOM

As leader of the Cary, North Carolina, branch of Capital Endurance Group, Delaney empowers his clients to turn today’s career success into tomorrow’s lifetime of financial security and freedom.

“Freedom means even if a career ended tomorrow, the client would still be able to educate children, assist aging parents, and do what they’ve always dreamed about—be it owning a vineyard or traveling the world,” Delaney says. “Moving from a subsistence retirement mindset to one of boundless possibilities is truly a revelation. It’s the moment genuine freedom—both financial and emotional—is achieved.”

Paul M. Delaney, CFA®, CFP®, is an investment advisor representative of Capital Endurance Group, Inc. Capital Endurance Group is a Georgia-domiciled investment advisor firm that conducts business in the states of Georgia and North Carolina. The firm’s principal place of business is located at 5755 North Point Parkway, Suite 250, Alpharetta, Georgia 30022. A copy of the current written disclosure statement (Firm Brochure) for Capital Endurance Group discussing its advisory services, fees, and business operations is available upon request.



5000 CentreGreen Way, Fifth Floor, Cary, NC 27513
919-228-6316
capitalendurancegroup.com | pauldelaney.com