



*Client Focused  
Investment Solutions*



**Wealth Management You Can Trust**





# Your Team

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Brian J. Ward, CFA  
Founder, Senior Partner

Mike Magee and Brian Ward launched Longford Wealth Management in 2023 to deliver investment management to both individuals and institutions. Longford Wealth differentiates itself by combining the traditional principles of long-term investing with the power of a robust and fully developed model driven platform that is instrumental in delivering a high quality and diversified portfolio management. This process is designed to provide our clients with their selected investment style(s) and risk level. In effect, our integrated approach will address your asset allocation, investment strategy, tax efficiency and long-term investment goals.



Michael P. Magee  
Founder, Senior Partner

For several years, we have worked together at Chartwell Investment Partners, where Mike served as the Chief Operating Officer and Brian was a Managing Partner. Our combined work history includes senior positions at The Killen Group, Morgan Stanley, Citigroup, Legg Mason and UBS, and together our investment professional careers span over 60 years.

Longford Wealth has partnered with Wealthcare Advisory Partners, LLC, a Registered Investment Advisor with over five billion dollars under management. Wealthcare has a comprehensive model driven platform that has been market tested and refined over the past fifteen years.

## Client-Centric Approach

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Our path in wealth management has been defined by our deep-seated belief in the power of meaningful relationships. Each client isn't just a portfolio to manage but a lifelong partner on a journey toward financial success. Our client-centric approach ensures that every decision is guided by the individual objectives and goals of our clients, leading to tailored solutions that truly satisfy their needs.

At the heart of our approach lies a genuine commitment to our clients' success and well-being. We take pride in the lifelong friendships we have developed with many of our clients, cherishing the deep personal connections that go beyond financial transactions. For us, being a wealth advisor isn't just a profession, it is a responsibility we willingly accept with humility and dedication.

## Our Services

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**Financial Planning:** We offer customized financial planning services to help you map out your financial future. Whether you're planning for retirement, saving for your children's education, or managing your wealth, we'll work closely with you to develop a personalized plan that aligns with your goals and priorities.

**Investment Management:** Our experienced team provides professional investment management services designed to help you grow and preserve your wealth. From asset allocation to portfolio rebalancing, we'll implement a tailored investment strategy to maximize returns while managing risk.

**Retirement Planning:** Planning for retirement is essential for ensuring financial security in your golden years. We'll help you navigate complex retirement planning decisions, including pension optimization, Social Security strategies, and withdrawal planning, to help you achieve the retirement lifestyle you desire.



### Freedom To Dream Big

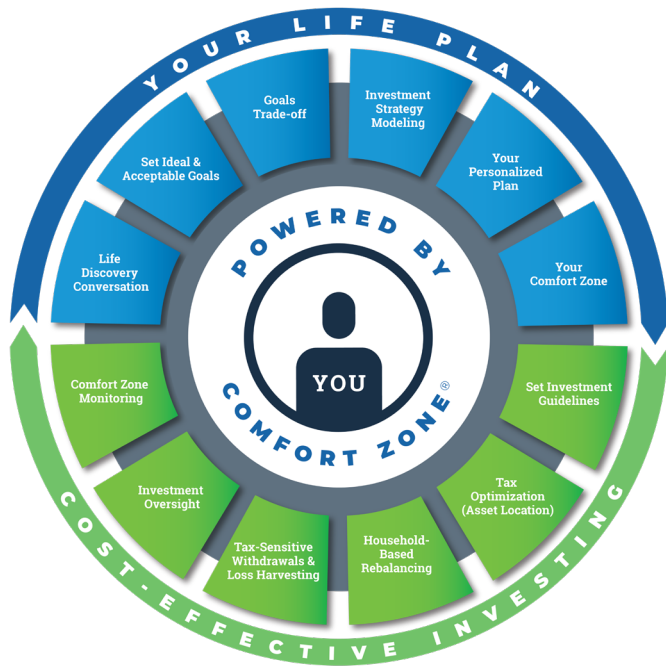
With the help of your Longford Wealth Management advisors, you will explore your highest aspirations and will imagine the life you may have never thought possible before.



# Partnerships To Give You More

## Wealthcare Advisory Partners

We partner with Wealthcare Advisory Partners to gain access to their goals-driven planning and investing platform, **WealthcareGDX®**. It's a turnkey solution for advisors that includes a robust digital client experience and back office support. This allows us to spend more time assisting clients on with building a financial strategy to reach their financial goals.



Wealthcare's easy-to-use patented technology, GDX360, synchronizes your financial planning and investment strategies to provide you with a **Comfort Zone®** score. It evaluates your financial resources alongside your goals-now and into the future. Then, it simulates 1,000 lifetimes and market scenarios, generating a score that reflects the percentage of times those goals would be met or surpassed. More than a number, your Comfort Zone score reflects how confident and comfortable you can be in your financial future.

## Meet The Team

Through Longford Wealth Management, gain unparalleled access to leverage the expertise of Wealthcare's financial services experts.



**Ron Madey, CFA®**  
Chief Investment Officer



**Ken Kideckel, CFA®, CFP®, MBA**  
Vice President,  
Portfolio Manager



**Luke Klecan**  
Investment Analyst



**John Schlichting**  
Trading and Portfolio  
Service Specialist



**Shantese Smithers-Alexander**  
Marketing Manager





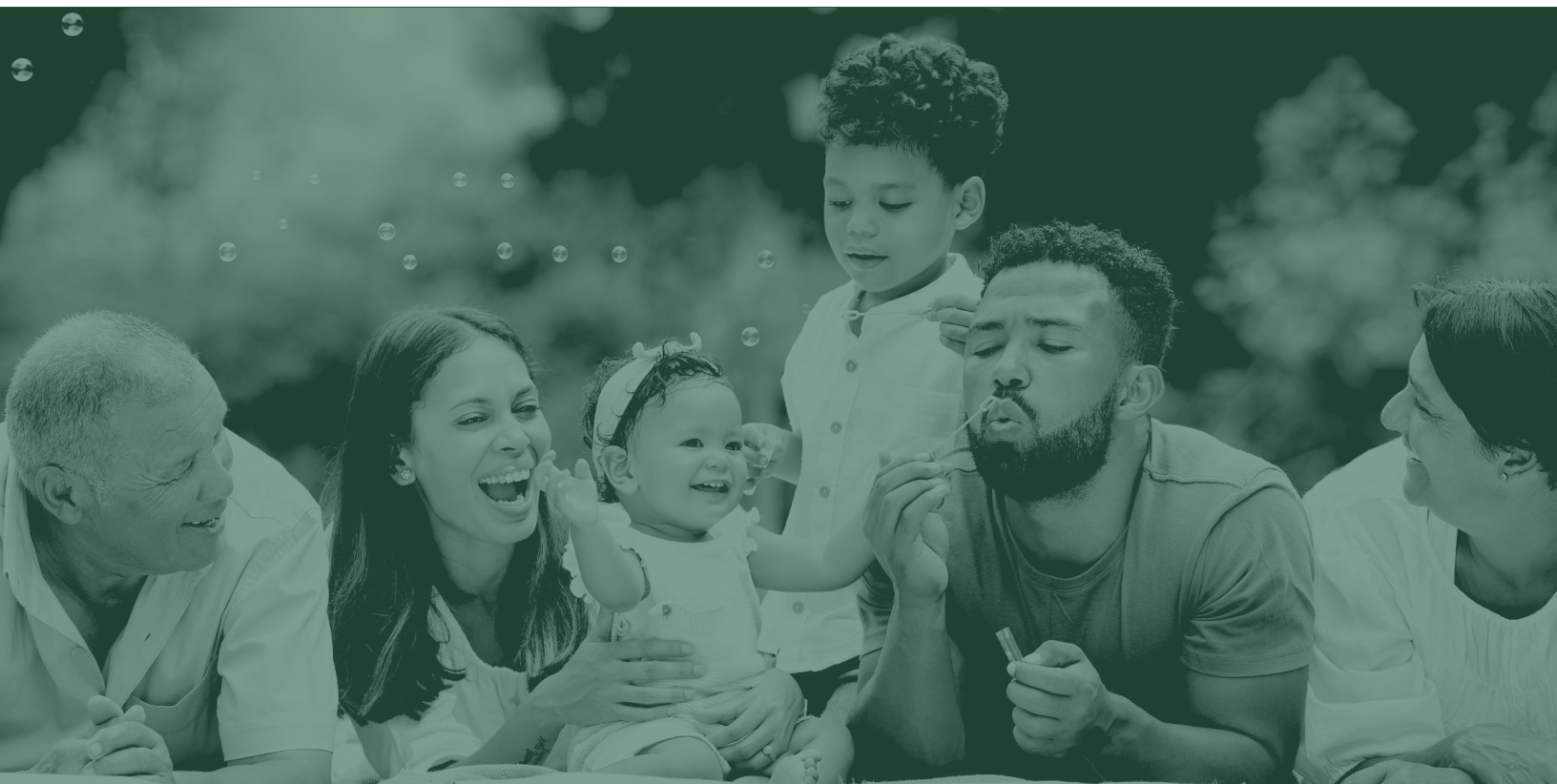
# Be A Part Of The Experience

Experience the difference of working with a seasoned wealth advisor who understands your needs and is committed to helping you reach your financial goals. We have never thought possible before.

## Our Products

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- Stocks
- Foreign Stocks
- ETFs (Exchange-Traded Funds)
- Employee Stock Option Plans
- Concentrated Equity Positions
- Tax Aware Investing
- Fixed Income
- Mutual Funds
- Certificate of Deposit Securities
- Corporate Bonds
- High Yield Bonds
- Government and Government Agency Bonds
- Mortgage-backed Securities
- Municipal Bonds
- Preferred Debt
- Cash Management
- Structured Note Bonds
- Fixed Annuities
- Variable Annuities Traditional IRA (Individual Retirement Account)
- IRA Rollover
- Roth IRA
- Employer-Sponsored Plans (401(k), 403(b), SEP, Profit Sharing, Deferred Compensation, Defined Benefit)
- Rollovers and Consolidation Services
- Comprehensive Financial Planning
- Retirement Planning
- Trust Accounts
- Special Needs Trusts
- Asset Protection Strategies
- Consolidated Account Management Across Different Financial Firms





# Award Winning Platform



**BARRON'S** **Forbes**

2023 Top 100 RIA Firms    America's Top RIA Firms 2023

Third-party rankings and recognition from rating services are no guarantee of future investment success. Working with a highly rated advisor does not ensure that a client or prospective client will experience a higher level of performance or results. Ratings should not be considered an endorsement of the advisor by any client nor are they representative of any one client's evaluation. Wealthcare Capital Management LLC ("WCM") is a registered investment advisor with the U.S. Securities and Exchange Commission ("SEC").

## Get in Touch

If you're ready to take control of your financial future and work with trusted advisors that have a proven track record of success. Schedule a consultation with your Longford Wealth Management advisor today. With Longford Wealth Management by your side, you can be rest assured that your financial well-being is in capable hands.

**Brian Ward**

302.562.7960  
bward@longfordwealth.com

**Michael Magee**

908.547.9007  
magee@longfordwealth.com





## Rankings Methodology

Barron's Third-party rankings and recognition from rating services are no guarantee of future investment success. Working with a highly rated advisor does not ensure that a client or prospective client will experience a higher level of performance or results. Ratings should not be considered an endorsement of the advisor by any client nor are they representative of any one client's evaluation.

Participation in Barron's Top 100 RIA Firms ranking is by invitation only and limited to firms which meet the minimum eligibility requirements. Generally, participating firms are evaluated and ranked from a wide range of quantitative and qualitative data including: assets overseen by the firm, revenue generated by the firm, level of technology spending, number of clients, size of staff, diversity across staff, and placement of succession plan. The ranking is not indicative of the firm's past or future performance.

Neither the firm nor its executives pay a fee to Barron's in exchange for this ranking. Barron's is a registered trademark of Dow Jones & Company, L.P. All rights reserved.

Forbes/SHOOK scours the financial services industry for nominations. SHOOK accepts advisors who meet pre-determined minimum thresholds and acceptable compliance records. As of this date, SHOOK has received nearly 42,643 nominations—advisors who meet SHOOK's thresholds. 23,100 of these nominees have taken an online survey.

Unlike other advisor rankings, SHOOK is not a "robo-ranker"—numbers such as production and assets don't tell the whole story, especially when much of the data is self-reported. SHOOK Research creates rankings of role models—firms that are leading the way in offering best practices and providing a high-quality experience for clients. A focus on both quantitative and qualitative factors, including telephone and in-person meetings, is imperative.

SHOOK Research is the only ranking firm that interviews firms and advisors via telephone and in person at the firm's location.

- **Basic Requirements.** A minimum of 7 years as an advisor for 1 partner/principal. Fully as a practice for a minimum of 1 year. Must incorporate a fiduciary model. Completion of online survey and interview with SHOOK. Evaluations focused on wealth management acceptable compliance record.
- **Quantitative Metrics.** Revenues, assets under management—and quality of those assets, client-related data, such as retention rates, portfolio performance is not a factor; audited returns among advisors are rare, and differing client objectives provide varying returns.
- **Compliance Issues.** The following conditions will be considered in order to lessen weightings infractions: Infractions that are denied or closed with no action: Complaint arose from a product, service or advice initiated by a previous advisor or another member or former member of team, length of time since complaint, complaints related to product failure not related to investment advice (some limited partnerships, adjusted-rate securities, etc.), complaints that have been settled (must be proven) to appease a client who remained with the advisor for at least one year following settlement date, complaints that are proven to be meritless actions taken as a result of administrative error or failure by firm.

Once an advisor's compliance rating falls into a tenable category, the following conditions must be met: An advisor's rating must be among SHOOK's highest qualitative measures including in-person interview and letters of recommendation.

The algorithm is designed to fairly compare the business practices of a large group of firms based on quantitative and qualitative elements. Data are weighted to ensure priorities are given to dynamics such as preferred "best practices," business models, recent business activity, etc. Each variable is graded and represents a certain value for each measured component. These data are fed into an algorithm that measures thousands of firms against each other.

## SHOOK Disclosures

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115 N. Broad St., Suite 4B  
Middletown, DE 19709

350 Springfield Ave., Suite 200  
Summit, NJ 07901

[Longfordwealth.com](http://Longfordwealth.com)

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GDX360 is Wealthcare's fiduciary process that integrates goals-based planning with investment implementation that includes cost and tax management services designed to put clients first.