Paul B. Elfner, CFP®, MSFS
Senior Associate Wealth Advisor
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Big changes give us a big chance to help.

"I feel a sense of satisfaction when I'm able to help a client through a life change or decision," Paul says. He works closely with other Wealth Advisors on the Domani Wealth team to support clients on their path to achieving their financial goals. This includes providing guidance in retirement, income tax, investment, estate, and insurance planning.

Paul particularly enjoys tax planning, as well as working directly with clients on fine-tuning their financial plans and building relationships with them.

As a member of Domani Wealth's Wealth Strategy Group, Paul plays an important role in our overall financial planning process and develops customized plans that align with clients' goals and objectives. Team members look to him for his tax-planning expertise. As part of his day-to-day responsibilities, Paul actively reviews clients' cash needs and risk profiles to coordinate with their investment portfolios.

The Domani Wealth core value that most resonates with Paul is curiosity, he says. "I am a big advocate of always trying to better myself and the knowledge and service I bring to clients. I like to research and find solutions."

He's also known for his positive attitude and ability to connect with people. Clients who work with Paul frequently comment about how helpful and responsive he is to their questions and needs. Combined with his love of numbers and finances, he's a great fit on the team.

## Professional Accreditations & Education

- CERTIFIED FINANCIAL PLANNER™ Professional
- Master's of Science degree in Financial Services, St. Joseph's University
- BS, Finance, Penn State University

## Community Involvement (current and prior)

- Lancaster Young Professionals