

NEWS

For Immediate Release

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AXG Advisors Acquires the operations of Rose Glen, LLC

Morey Goldberg and team join forces with George Papanier and Adam Pauska, expanding global capabilities for discerning, ultra-high net worth families

Philadelphia, PA [January 5, 2023] –[AXG Advisors](#) (AXG) an established financial services company that provides tailor-made insurance and risk mitigation solutions, today announced that it has acquired the operations of [Rose Glen LLC \(Rose Glen\)](#), a firm that has long provided innovative wealth transfer, preservation, and accumulation solutions to ultra-high net worth families across the country. This union brings a successful mentor/protégé relationship full circle. AXG co-founder, George Papanier worked under the tutelage of Morey Goldberg and team for several years prior to launching AXG Advisors with Adam Pauska in 2019. Goldberg will join AXG as a senior advisor.

Headquartered in Wynnewood, PA (just outside of Philadelphia), Goldberg’s firm has maintained the same leadership for almost 20 years and the majority of that group will stay on with AXG. As a result, the same people who helped Papanier earlier in his career will now become a part of the AXG family.

“Morey is highly regarded in the life insurance industry, and I was fortunate to learn from him early in my career,” Papanier said. “We have the mutual belief that putting clients first is the foundation for professional success. This acquisition of Rose Glen’s operations will provide continuity and security for all the clients and stakeholders involved. All of us at AXG are grateful to continue the Rose Glen legacy by maintaining the same high standards and level of expertise that their clients have come to expect.”

WHITE GLOVE APPROACH

AXG caters to ultra-high net worth clients and takes a white glove approach to their needs. “Insurance should be about more than just the things we protect,” Pauska explained. “Since its inception, the goal of AXG has been to change the private client industry and how our clients mitigate their exposures. The acquisition of Rose Glen is another step forward in achieving this goal. The addition of Morey and his team will enhance AXG’s private client operations to service the full scope of risk management for our clients.”

Rose Glen is dedicated to the long-term financial health of not only their clients, but their clients’ heirs as well. “We are committed to helping each client decide how and when to allocate their wealth among both family (immediate and extended) as well as charitable organizations,” Goldberg said. “Another responsibility vital to wealth preservation is the mitigation of the transfer tax burden. Our clients appreciate our commitment to working with their other advisors to in order to integrate the implementation of and revisions to our strategies over time, as comprehensive reviews are completed.”

UNIQUE FOCUS

AXG focuses on each client’s individual circumstance, engineering highly-specialized risk mitigation solutions and “insurance as alternative investment” products in the wealth transfer, wealth preservation, and wealth accumulation spectrum. Technicians first and salespeople a distant second, the firm doesn’t simply follow the assembly line approach taken by most other insurance companies that provide limited choices from already-existing, every day insurance products. Instead, AXG prides itself on its “clean slate approach” to each situation, creating new and innovative insurance solutions tailor-made to meet the unique needs of each individual, resulting in a modern private client experience.

AXG clients may be concerned about:

- Jewelry, couture, wine, art, and other collections
- Yachts, private aviation, and exotic cars
- Liabilities that come from owning multiple homes and employing domestic staff
- Real estate portfolios
- Business exit and succession planning
- Insuring family property such as a compound, farm, ranch, island
- Using insurance to de-risk in the event of natural disasters, lawsuits, death, or disability
- Tax-deferred asset accumulation
- Income tax-free death benefits
- Family protection and wealth creation
- Debt protection
- Estate tax liquidity
- Gifting leverage
- Charitable contributions

ABOUT ROSE GLEN

Rose Glen, LLC integrates financial and insurance solutions for its clients' wealth transfer and accumulation needs with an inter-generational focus. Driven by a commitment to client advocacy, quality service, and integrity, they believe in a white glove approach to client relationships. The firm believes in focusing on the unique needs of each client and working with their advisors in order to provide innovative, custom financial solutions designed to meet wealth transfer, wealth preservation, and wealth accumulation goals.

Rose Glen is comprised of MBA, CPA, and Life Insurance Design professionals. Through their affiliation with M Financial, one of the largest buyers of life insurance for wealthy families and public companies in the country, they had access to a significant level of product due diligence and some of the best products in the market – in addition to a significant staple of proprietary products with major insurance carriers.

The firm also caters to corporations, specializing in Disability and Long-Term Care Coverage, Deferred Compensation, and Voluntary Disability plans – and using proprietary products where possible. The plans can be designed utilizing innovative funding vehicles at little or no cost to the company.

ABOUT AXG ADVISORS

Founded in 2019 by George T. Papanier and Adam M. Pauska, AXG Advisors is an ultra-high-end, boutique insurance brokerage firm that provides each of its clients with sophisticated analysis, guidance, education, and individualized risk mitigation. The firm specializes in working with ultra-affluent across the globe and creating unique risk management solutions that protect these affluent individuals and families against uncertainties and potential disasters.

Dedicated to the science of insurance, the firm's advisors understand the intricacies of modern technology and risk assessment. Continually monitoring the evolution of the current insurance landscape informs the way the company approaches risk in order to give its clients personalized guidance that matches each risk profile as it evolves. This enables the firm to proactively think ahead for its clients by designing multiple strategic and swift approaches as they seek to foresee client needs and potential changes ahead. As a result, AXG anticipates and mitigates every step of the way for their clients.

Bringing extensive experience and professionalism to the client relationship, each advisor begins by deconstructing every individual insurance requirement, analyzing it from a technician's point of view, then engineering a solution uniquely suited to the client's individual needs and concerns. This technological approach to insurance leads to risk-management innovations, allowing much more value and a far greater advantage for each client.

To schedule an exploratory conversation and/or to learn more, visit www.AXG-Advisors.com.

*Securities offered through Lion Street Financial, LLC. (LSF), member FINRA & SIPC. BrokerCheck, LSF CRS.
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