

Financial planner keeps Lehigh Valley ties

As he works to expand his business in New York and Las Vegas, financial planner Christopher M. Jones said he is establishing a new headquarters in Easton. At the same time, he is changing his business to Sparrow Wealth Management. He formerly operated out of Macungie under the name Keystone Financial Planning. The name change was official Jan. 1.

“It’s basically a brand-new company,” said Jones. He explained that as a registered investment advisor with the



Christopher M. Jones

U.S. Securities and Exchange Commission (SEC), he could not simply change the name of the business. He needed to re-register with SEC and move his old clients over to the new business. At the same time, he converted from a sole proprietorship to an S corporation.

Jones said he moved the office to Easton to be closer to New York

City, where he also has clients.

“My minimum client usually has investment assets of at least \$1 million or a net worth of at least \$2 million,” said Jones. “Given the demographics of the typical client I work with, I felt that New York City was a more suitable location to grow my firm.”

Jones said he decided to keep his headquarters in the Lehigh Valley because that’s where he started the business, and he still has about 30 percent of his clients in the area.

He said that since the firm runs a paperless office, he can operate out of any home base.

Jones said he plans to hold grand openings for both his Lehigh Valley and New York offices in April.

Sparrow Wealth Management is located at 3655 William Penn Highway, Suite B, Easton.

More information can be obtained on the Web site www.sparrowwealth.com or by calling (877) 330-9191.