

McLean Asset Management Names Paula Friedman as its Chief Executive Officer

Friedman, who has been with the firm since 2013, will succeed Alex Murguia.

Murguia will continue to work as Executive Chairman and Chief Investment Officer.

TYSONS, VA, UNITED STATES, January 6, 2025 /EINPresswire.com/ -- [McLean Asset Management Corporation](#) (McLean), a nationally recognized wealth management and retirement income planning firm,

“

Paula’s vision aligns perfectly with the direction we see for McLean and the industry at large. Her unparalleled work ethic and leadership make her the ideal person to take the firm forward.”

Alex Murguia, Managing Principal

proudly announces the appointment of Paula Friedman as its Chief Executive Officer (CEO). Friedman, who has been with the firm since 2013, will succeed Alex Murguia. Alex will continue to work as Executive Chairman of McLean while also serving as Chief Investment Officer.

Friedman joined McLean to lead its employer retirement plan division and quickly distinguished herself with her unwavering dedication to clients and her ability to deliver meaningful results. “Paula’s passion for doing things the right way was a natural fit for our firm’s culture and

mission,” said Dean Umemoto, the firm’s founder. “Her strategic mindset and ability to add value across multiple areas of the business led us to entrust her with greater responsibilities over time.”

In 2017, Friedman was promoted to managing principal, a role in which she played a pivotal part in expanding the firm’s retirement income planning capabilities. Working closely with Murguia and Umemoto, she helped craft the firm’s strategic vision, ensuring McLean’s continued evolution in a rapidly changing industry. “Paula’s vision aligns perfectly with the direction we see for McLean and the industry at large,” said Murguia. “Her unparalleled work ethic and leadership make her the ideal person to take the firm forward.”

Throughout her tenure, Friedman has spearheaded numerous initiatives, including developing a standalone planning and insurance practice area to broaden McLean’s suite of services. As CEO, she remains committed to fostering McLean’s warm, collaborative culture while pursuing innovative strategies to enhance client outcomes. Guided by the firm’s fiduciary mission, she ensures that clients remain at the core of McLean’s approach.

About McLean Asset Management:

McLean is a wealth management and financial planning firm specializing in retirement income planning. Our fiduciary approach blends academic rigor with approachable advice, delivering solutions tailored to our client's unique needs, goals, and values. For more information about McLean, visit www.mcleanam.com.

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Paula Friedman, CEO and Managing Principal of McLean Asset Management Corporation based in Tysons, VA

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