



Early, Cassidy & Schilling, LLC

Commercial Insurance • Risk Management • Surety
Employee Benefits • Executive Benefits

Paul J. Phelan, CFP®

Paul is a Principal and Practice Leader at Early, Cassidy & Schilling, LLC. He joined the firm in 2003.

At Early, Cassidy & Schilling, LLC, Paul covers all areas of the Employee & Executive Benefit Practice. He works closely with traditional Employee Benefits (health, life, disability), but more importantly consults with Finance and HR departments to build complete plans including employee training, administrative services, and legal & regulatory consulting that make sense from on-boarding through departure for employees while working within the budget of the organization. Paul's work expands into retirement planning, working with organizations on their 401(k) or 403(b) plans, advising the organization on plan design, expense control, employee education and best practices. Finally, Paul's Executive Benefit Practice rounds out with work handling Executive Carve Outs for Life and Disability Coverage as well as Non-Qualified Deferred Compensation.

Paul graduated from Bowling Green State University with Bachelors in Business Administration where he majored in Marketing. Paul holds insurance licenses in all 50 states, Series 6, 7, 65 and 63 securities licenses and he has held the CFP® certification since 2005.

Paul is a 5-year coach for Girls on the Run of Montgomery County, and he has also been the Vice Chairperson of the GOTR Montgomery County Board since 2015. He and his wife live in Gaithersburg, MD, and he is the proud father of two brilliant daughters.





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