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by **Bill Donahue**
photos by **Jeff Anderson**

Hard Work Pays Dividends

Known for his tireless research and hands-on management, **Brendan McPoyle, CFP®, AEP®, of Princeton Global Asset Management** develops tailored strategies designed to help clients achieve their financial goals.

Brendan McPoyle, CFP®, AEP®, has a clear-eyed view of his role in each client's life: a financial coach, a creator and sustainer of freedom, a builder of financial empires.

A dedicated wealth manager at Princeton Global Asset Management, McPoyle has spent more than 25 years helping business owners, high-net-worth families, and hardworking professionals make confident decisions that will have a direct impact on the future. His vast expertise in comprehensive financial planning and wealth management grew out of a work ethic shaped by his blue-collar roots.

"I live by the simple belief that wealth should empower the life you live today and the legacy you leave tomorrow," he says. "My drive comes from a family background that taught me to work hard, to plan thoughtfully, and to protect what matters most. The financial security that I help provide to families is my *why*. This is who I was meant to be. This is who I am."

McPoyle's early life had a profound impact on his career. The 12th of 13 children, McPoyle grew up watching his parents work tirelessly to provide opportunities for him and his siblings, including a Catholic education. Their example stayed with him while he earned a business degree from Merrimack College and began to envision his post-graduate life.

"I was a young father and had to discover a way to provide a good life for my growing family," he says. "When I needed a good job, I reached out to one of the most successful people I knew and asked for advice. I quickly learned that good people

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want to see you succeed, and that a little persistence and hard work pay off. I made sure that I took advantage of his advice and the opportunities presented. He helped me better position myself to land a job at one of the region’s largest financial service organizations.”

McPoyle steadily expanded his knowledge, gained additional licenses and designations—including CERTIFIED FINANCIAL PLANNER™ practitioner and Accredited Estate Planner®—and learned “how to talk to and really listen to people,” he says. As he built his client base, the principles of honesty, authenticity, and tenacity guided him.

“It’s important to have someone you can trust to add value, listen, and put the tools in place that are going to help you,” says McPoyle, who has earned a reputation for excellence over the past two decades. “The people I work with are very good at making money. They just don’t have the time, inclination, or knowledge to best manage it. Just like the benefits of hiring a personal trainer, everyone needs a financial coach to assist them along the way. I want to be that coach.”

‘I’m Always There for My Clients’

Understanding each client’s goals and values allows McPoyle to tailor strategies for investment management, retirement income planning, charitable giving, generational wealth transfer, and legacy preservation. His holistic approach includes budgeting, asset allocation, insurance planning, and risk management, ensuring that clients are not only positioned for growth but also protected from “life’s unexpected storms.”

“I work with people who value utilizing a professional to achieve their goals in life,” he says. “If something affects your financial well-being, I want to be your first call. I once had a mentor tell me, ‘Just do what’s right for the client and you’ll never go wrong.’ That sounds simple enough. Being a fiduciary means that I’m always there for my clients, advising them for life. I’ll be there to stick by the recommendations I have made.”

He finds particular satisfaction in helping women build wealth and attain financial independence.

“I adore my wife, Jen, and I have a daughter, seven sisters, 25 nieces, and a mother who is an angel on Earth, and I’ll do everything I can to make sure they are financially independent,” he adds. “Jen and I work on our finances together, we discuss big decisions, and we review where we are and the goals we share. I find that very important for both of us.”

Over the years McPoyle has cultivated a vast network of professionals to assist his clients with their everyday and legacy needs. He has also built long-standing relationships with clients, often working with multiple generations of the same family—a responsibility he considers an honor and a privilege.

“Some of my clients were there when my kids were born, and now I’m helping their children,” he says. “I do so honestly with their goals and dreams in mind. My clients know they can trust me to help them successfully build financial security and their financial legacy.”

McPoyle, who lives and works in Havertown, Pennsylvania, is a lifelong Delco resident devoted to his community. He’s an active member of the Delaware County Estate Planning Council, the Irish American Business Chamber & Network, and the Haverford Partnership for Economic Development, also known as Discover Haverford. Having been an active community youth coach for more than 20 years, he now lends financial support to teams from nearby St. Joseph’s University, Haverford School District, Brookline Baseball & Softball, and his alma mater, Monsignor Bonner & Archbishop Prendergast Catholic High School.

He also looks forward to mentoring the next generation of financial professionals, just as others once helped him forge his path. His advice for anyone entering the industry: “Find an honest advisor that believes in fiduciary responsibility who can guide you. Be thankful for what you build, and look out for the next person in line.”

“I got here because I worked hard, and I really do like money,” he adds. “The freedom it provides can be liberating. I love to educate people about investing and the power of compounding interest, and how to make their money work harder for them than they did for it. Most importantly, I like working with people, and I enjoy helping them succeed, whether that means making their money work for retirement, funding their children’s education, or helping give future generations a little better life than they had.”

As he reflects on his career, McPoyle sees a journey marked by grit, determination, and perhaps a little Irish luck. It all began with a desire to provide a good life for his family—Jen and their three children, Brendan, Finn, and Grace—though his purpose has since grown to include helping others build financial legacies and create peace of mind for the people who matter most.

“I want to be on the finish line of life one day, knowing that I have spent valuable time with my family and provided a good life for them,” he says. “I also hope that my clients and friends feel they are better off both financially and in their life for knowing and working with me. If you are seeking a trusted advisor who will be with you every step of the way, let’s start a conversation.” ■

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