

HELPING YOU BUILD A

PROMISING FINANCIAL FUTURE



Whether you are just starting out, building a career and raising a family, approaching retirement, or enjoying life in retirement, Green Financial can help. They can guide investment and retirement planning, and help you with all the many financial decisions along the way.

In over 34 years of providing financial advice, Roger Green, MSFS, CFP®, President/CEO of Green Financial Resources, LLC, has advised thousands of people through the good times and the challenging times.

“When we get a call from a client or a referral, normally it’s because they want to make sure that they’re doing all that they can to invest, allocate their monies properly, and save on taxes so they can try to plan for a more successful retirement.” says Roger Green. “I use my ‘Harvesting Plan’ for retirement assets to guide them with a process that allows for the potential for asset growth throughout retirement.”

Excellence in customer service has always been a major focus, and Roger has always invested in staff to provide responsive service to his clients. Wife Laura Green has served for over 20 years as COO, managing all staff, customer service, marketing, bookkeeping, and compliance. Kelly Schmidt, another 20+ year staff member, supports Laura as Team Lead of the Client Service Managers and supervisor of the front desk administrative team. Over five years ago, sons Andrew and Michael Green joined the firm as advisors, helping to continue Green Financial legacy.

This ongoing effort has yielded Roger and Green Financial multiple recognitions and awards, including the Gwinnett Chamber Small Business of the Year award, several years of Gwinnett Magazine’s own Best of Gwinnett designation and-

-on more than one occasion—Roger’s inclusion in Barron’s Top Advisor lists. But the desire to help improve the lives of others ventures beyond just business and financial interests.

For years Roger Green and his firm have invested in the local community as a way to “pay it forward”. Over \$550,000 has been raised for charities from their last eighteen charity golf tournaments, and support has been provided to a multitude of additional organizations. Roger received a Public Service Award in 2018 from the Gwinnett Chamber. In 2021, Roger earned \$50,000 for his favorite charity when he won the Community Service category in the national “Invest in Others” award program.

But Roger says his most impactful community service has been through his years of helping others with their money. Hearing some of the “beautiful stories from clients” he and his firm have helped guide is one of his greatest rewards. “I’ve seen people live their dreams in retirement and be able to leave money to their children, help with the grandkids’ college, leave money to charity, and do all kinds of wonderful things through planning and investing.”

Take action now for your financial future by scheduling a no-cost Zoom or phone consultation, with no minimum asset requirements.

Visit www.RogerSGreen.com or call 770-931-1414. Green Financial is here to help!

GREEN
FINANCIAL

770.931.1414
ROGERSGREEN.COM

GREEN FINANCIAL RESOURCES, LLC
3700 CRESTWOOD PKWY. NW, STE. 140
DULUTH, GA 30096



Investment Advisor Representatives offering securities and advisory services through Cetera Advisors LLC, a Registered Investment Advisor, Broker/Dealer, member FINRA, SIPC. Green Financial and Cetera Advisors are not affiliated. Awards are not to be considered a guarantee of future results, nor as an endorsement by any client. Small Business award rankings are based on growth, revenue, community service, and other criteria. Barron’s rankings based on total assets (AUM), revenue, and other factors. Best of Gwinnett winners are chosen via voting and editors’ input, & opinions are vetted with the use of other available information. Public Service via standing and service within the community.