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RogerSGreen.com



Roger S. Green
President/CEO



L-R: Jordan Doyle, Samantha Adams, Sarah Parks, Kelly Schmidt, Melanie Miller, Tim Conway, Laura Green, Roger Green, Michael Green, Jason Piper, Brittany Knowles, Taylor Sloss, Andrew Green, Beverly Gault

HELPING YOU BUILD A

PROMISING FINANCIAL FUTURE

Over thirty-three years. Thousands of meetings. An extraordinarily wide range of client financial situations. More than two decades teaching retirement planning classes at local colleges, and almost that many hosting a weekly educational radio program. This is the story of Green Financial Resources, LLC and President/CEO Roger Green, MSFS, CFP®, who has used his knowledge and wide-ranging experience to help individuals plan to do more with what they have.

Whether you are just starting out, building a career and raising a family, approaching retirement, or already enjoying life in retirement, Roger Green and the team at Green Financial can help. They can not only guide investment and retirement planning and help you with all the many financial decisions along the way, but they also collaborate with heirs for intergenerational planning.

Today, with the pandemic turning the best laid plans upside down, people from all socioeconomic backgrounds are facing challenges never anticipated. You need a financial partner to help guide you. With experience weathering some of the most challenging storms of the past, including the financial crises of 1987, 1990, 2000, and 2008, Green Financial has proven its competency and skill. The team leverages its long-standing experience to build a plan for clients' todays and tomorrows--and all the uncertainties speckled in between.

During these times, the firm has pivoted seamlessly to a remote Zoom based environment, to help keep their staff actively working for you without any disruption in service. Although the firms hopes to be back to in-person meetings soon, they've been able to harness technology to continue to consult clients as they always have--without sacrificing the warmth, attention and care signature to their business for decades.

Excellence in customer service has always been a major focus, and Roger continues to invest in a large administrative staff and four other advisors to provide the responsive service he wants for his clients. These include Jason Piper supporting Roger for over twenty years, Tim Conway for over ten years now, and more recently sons Andrew Green and Michael Green who are being mentored to carry their dad's legacy forward. Wife Laura Green, the firm's COO, has served for over 20 years as the backbone of Green Financial Resources, choreographing the moving parts to keep everything in sync:

all staff, customer service and operations. 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.

The firm's success is, in part, fueled by Roger's vision, which crystallized early on and has steered the firm's efforts. "Helping people make wiser and more informed financial decisions--and getting them in a better place than they would have been without experienced guidance -- is what I love about this profession," he says. This, coupled with the firm's focus on customer service and an unyielding passion for helping others, has kept things running strongly and growing for more than three decades now. Subsequently, those ongoing efforts have yielded Roger and Green Financial multiple recognitions and awards, including the Gwinnett Chamber Small Business of the Year award, Gwinnett Magazine's own Best of Gwinnett® designation and--on more than one occasion--Roger's inclusion in the 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 \$500,000 has been raised for charities from their last fifteen charity golf tournaments they fund and organize; and support has been provided to a multitude of additional organizations. Roger received a Public Service Award in 2018 from the Gwinnett Chamber for his many contributions to his community.

With a true desire to do good all-around--for clients and the community - Green Financial has its heart focused on your best interest and is prepared to help you plan to pursue a successful financial future. Call (770) 931-1414 or visit www.RogerSGreen.com to set up a no-cost, no-obligation consultation whether you are looking to get a plan on track or merely seeking a second opinion on your current plan. Green Financial is here to help!

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