



GFR Staff: Seated: Andrew, Roger, and Michael Green. Back: Laura Myers, Tricia Fryman, Sarah Parks, Michelle Hawkins, Alby Crowe, Kelly Schmidt, Laura Green, Melanie Miller, Samantha Mangrum, and Beverly Gault. Not pictured: Taylor Sloss and Cathy Holbrook.

HERE to HELP

**A WEALTH OF FINANCIAL
EXPERIENCE YOU CAN **DEPEND ON****

Need help planning for your financial future? Whether you are just starting out, building a career and raising a family, approaching retirement, enjoying life in retirement, or putting your estate planning in place, Green Financial can help.

Roger Green, MSFS, CFP®, President/CEO of Green Financial Resources, LLC, has advised thousands of people through the good times and the challenging times in his 35+ years as a financial and

investment advisor. In more recent years, sons Andrew Green, CFP® and Michael Green, CWS® have joined him, to carry the legacy of helping others into the future.

"When we get a call from someone, normally it's because they want to make sure that they're doing all that they can to invest and allocate their monies wisely, save on taxes, and try to grow their money - so they can try to plan for a more successful retirement," says Roger Green. "We use my 'Harvesting Plan' for retirement assets to guide them with a process that allows for the potential for asset growth throughout retirement."

When you are talking about your money, service is important. Roger's wife Laura Green has served for over 22 years as COO, managing all staff, customer service, marketing, bookkeeping, and compliance. Kelly Schmidt, another 22+ year staff member, supports Laura as Team Lead of the Client Service Managers and supervisor of the administrative team. This team of 3 advisors and 12 support staff will take exceptional care of you.

With the focus on excellence in all they do, Roger and Green Financial have accumulated years of recognition and awards, including Gwinnett Chamber Small Business award, the Best of Gwinnett designation for consecutive years and several years of Roger's inclusion in Barron's Top Advisor lists.

Beyond that, Roger Green and his firm have made it a priority to give back to their local community. Over \$600,000 has been raised for charities from their last 19 charity golf tournaments. 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" awards for his involvement with Auditory-Verbal Center.

All of this is rewarding, but Roger says by far his biggest reward and most impactful community service has been the many years of helping others with their money.

Roger went on to say, "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. It's a very rewarding career, and I love making a difference."

Take action now for your financial future by scheduling a no-cost in-office or Zoom consultation. No matter what your situation may be, or what assets you may have, Green Financial is here to help!



**Visit www.RogerSGreen.com
or call 770-931-1414**

Green Financial Resources, LLC | 3700 Crestwood Pkwy. NW, Suite 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.

