



TRUSTED FINANCIAL SUPPORT THROUGH EVERY SEASON

Green Financial Resources, LLC

Here to Help You Prepare, Protect, and Prosper

Life has a way of surprising us, and not every change comes with a roadmap. Some milestones bring joy, like welcoming a baby, starting a new career, or receiving a windfall. Others, like a divorce, job loss, or losing a loved one, can leave you feeling uncertain, overwhelmed, and financially vulnerable. When life does take an unexpected turn, it makes all the difference to know you have trusted guidance by your side. That's where Green Financial Resources (GFR) comes in.

Whatever your current stage of financial planning, GFR's advisors are here to meet you where you are. Roger Green and his firm have been helping people navigate financial, retirement, and legacy planning for decades. Working alongside his son, Andrew Green, the pair now share nearly 47 years of combined experience in the financial services industry. Together, they offer a balance of seasoned wisdom and fresh perspective, making it easier for clients to create strategies that match their values and long-term objectives.

At GFR, the focus has never been just on where your money is invested. Their role is to act as a trusted partner whenever important financial decisions need to be made. For many clients, this means guidance on questions such as Social Security timing, determining the right insurance coverage, or deciding how to allocate a 401(k). For others, it might involve planning for college funding, weighing the pros and cons of a major purchase, or figuring out the best way to harvest assets in retirement. Legacy planning is also a major part of the conversation, ensuring that the wealth you've built supports future generations in meaningful ways. Because life doesn't follow a script, the GFR team is there to provide ongoing answers, resources, and reassurance for every stage of your financial journey.



Andrew Green, CFP®, AIF® | Roger S. Green, MSFS, CFP®

Leading the firm's operations, overseeing staff, and guiding GFR's stellar service delivery is Laura Green, Roger's wife and COO for over 25 years. She's supported by Kelly Schmidt, Client Service Manager/Team Lead and fellow 25+ year veteran. The team includes seven Client Service Managers and a three-person administrative staff, all dedicated to delivering exceptional customer service. Over the

years, GFR's commitment to all-around excellence has been recognized through a lengthy and varied list of awards. In 2023, 2024 and again in 2025, the firm was honored as a finalist in three Gwinnett Chamber Small Business Award categories: Culture Creator, Community Contributor, and Small Business (6–24 employees), and they won the Culture Creator category in 2024. GFR has twice earned a Small Business Award (2008 and 2016) and Roger himself received a Gwinnett Chamber Public Service Award in 2018. Andrew Green was a 2024 Gwinnett Young Professionals 35Under35 winner. On top of these honors, clients have shown their ongoing appreciation, voting GFR Best of Gwinnett for 11 consecutive years (2014–2024).

With a strong foundation built on education, innovative asset-harvesting strategies, and decades of experience, Roger and Andrew Green are prepared to help you approach the future with confidence. Take the guesswork out of financial planning and let GFR be your partner

through life's changes. Reach out at 770-931-1414 or visit www.RogerSGreen.com to schedule a no-cost, no-obligation consultation with no asset minimums. However life unfolds, GFR is ready to help you plan to create a brighter financial future.



Call or visit our website!

RogerSGreen.com
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Roger Green and Andrew Green are 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. Gwinnett Chamber Small Business award nominations based on growth, revenue, community service, and other criteria with applications judged by a Chamber panel. Public Service Award - Nominated and selected by the Gwinnett Chamber, based on an individual's service rendered within the community, over and beyond excellence in one's profession or business. Best of Gwinnett winners chosen by Gwinnett Magazine via voting and editors' input, & opinions are vetted using other available information. 35 Under 35 Awards - Top 35 selected from applications from those under 35 in the Gwinnett Community judged by a Gwinnett Young Professionals (GYP) panel (part of Gwinnett Chamber). Awards are not to be considered a guarantee of future results; nor an endorsement by any client. No fees are paid to obtain any awards. Further information or criteria for awards can be readily found online.