



Roger S. Green
President/CEO



ROGERSGREEN.COM

GREEN FINANCIAL to HERE HELP

Preparing for your financial future can feel daunting, often leading to procrastination—or worse—inaction. Roger Green, MSFS, CFP®, President/CEO of Green Financial Resources, LLC (GFR), has made it his life mission to make it easy for everyone to get the help they need.

With over 30 years of experience, Roger has the training and experience to help individuals plan through all phases of life and all financial situations. Thirty years and thousands of meetings helping people with nearly every type of financial situation and challenge imaginable. Thirty years of managing investments through all types of market situations.

To meet Roger's goal of helping as many people as possible secure a firm financial future, GFR offers free initial consultations with no asset or income minimum. These no-obligation consultations are conducted in his Duluth office and scheduled to take place over approximately two hours.

Roger has invested in a stellar team that includes a large administrative staff and four additional advisors, including Jason Piper, who has worked as an advisor for 20 years and Tim Conway, who joined 9 years ago in a similar role. Laura Green, Roger's wife and the firm's COO for the past 20 years, manages all staff, customer service, and operations. Sons Andrew and Michael

Green joined as advisors more recently, with the goal of following in their father's footsteps and ensuring the business continues to serve future generations.

The team is qualified to guide not only your retirement and investment planning, but also to coordinate intergenerational and estate planning with heirs, ensuring all your asset-related goals are achieved. Even if you believe you have a solid plan in place, a second opinion may help ensure you are making the most of what you have.

Beyond the office consultations, Roger offers his knowledge as a financial educator, having devoted over 20 years to teaching retirement planning classes at local colleges, with the current course offerings listed at www.rogersgreen.com. "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," says Roger.

The company has received multiple awards that recognize their success and excellence, such as being recipient of the Gwinnett Chamber Small Business of the Year Award in 2016 and securing Gwinnett Magazine's Best of Gwinnett® Awards designation for several years. Green has also made the Barron's Top Advisor listings multiple times, including in 2019.

Beyond the free-consultations, the educational classes, and the focus on all-around excellence, Roger and Green Financial have also given back to their community in other ways. This September, they will host their 18th golf tournament, having raised over \$500,000 for charities through this event since they began. For his extensive time and financial support provided to numerous organizations, Roger was recognized in 2018 with a Public Service Award presented by the Gwinnett Chamber.

Customer-focused, family-oriented, community-minded, and over three decades of experience—Roger and Green Financial are among the best of the best for your financial needs. Call (770) 931-1414 or visit www.RogerSGreen.com to set up your free consultation and take control of your financial future.

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