



COMMITTED TO EXCELLENCE— COMMITTED TO HELPING YOU

**Green Financial voted a Best of Gwinnett/Financial Advisors!
Celebrating 11 years running (2014-2024)**

Roger Green, MSFS, CFP® and his firm have a history of commitment to excellence and service. GFR won an overall Gwinnett Chamber Small Business Award not once but twice (2008 and 2016). GFR has also been a finalist under the Small Business (2009-2014, 2018, 2023), Community Contributor (2021, 2023), Support System (2019), and Culture Creator (2022-2024) categories under the expanded Small Business Awards, demonstrating their all-around focus on excellence. In 2024, GFR won

the Culture Creator Award, based on their commitment to their employees. Roger Green received a Chamber Public Service Award in 2018, for his contributions to the Gwinnett Community. Both Michael (2020) and Andrew (2022) were awarded 35 Under 35 Awards from the Chamber's Gwinnett Young Professionals organization. These are just a few of the long list of awards and accolades. This is a firm that demonstrates ongoing commitment to excellence, and a firm committed to helping you.



Michael Green, CWS® Roger S. Green, MSFS, CFP® Andrew Green, CFP®, AIF®

Roger Green has been helping people with their financial, retirement, and legacy planning for over 35 years. Along with his sons, Andrew Green, CFP®, AIF®, and Michael Green, CWS®, these three financial advisors offer the strategies and guidance to help you plan effectively to achieve your goals.

Financial decisions are hard - some of the most challenging decisions we make in life. Many of us choose to procrastinate, and then realize we've wasted opportunities. Some take action, but miss things they need to consider to put a truly effective plan in place. GFR is here to help you through life's ups and downs, and to be your source for financial and retirement planning, investment decisions, and all those financial questions you will have along the way.

Planning for your financial future is about more than just how to invest your money. GFR's advisors serve as

a resource to help guide you when you face questions about Social Security timing, insurance needs, 401(k) allocation, decisions about major purchases, college funding, harvesting your assets in retirement, legacy planning - and so much more that pops up throughout all phases of life. Form a long-lasting partnership, and have ongoing access to experienced financial guidance for all life's biggest moments.

In addition to financial guidance, GFR has made stellar customer service a primary mission. Laura Green, Roger's wife and COO of 24+ years, manages all staff and service delivery, marketing, and operations. Laura is supported by Client Service Manager/Team Lead, and another 24+ year employee, Kelly Schmidt. GFR is well-staffed with a team of 7 Client Service Managers and 3 administrative assistants; all fully committed to exceeding your service expectations.

Take action now to prepare a plan with GFR. Contact GFR to schedule a no-cost, no-obligation consultation without asset minimums. Wherever life takes you, GFR is committed to excellence; and committed to helping you.



Call or visit our website!

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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.