



FINANCIAL CONFIDENCE, BUILT AROUND YOU

Green Financial Resources is Here to Help You Prepare, Protect, and Prosper.

Life rarely follows a neat timeline. One year might bring a new job, a growing family, or a long-awaited retirement. Another might bring loss, transition, or unexpected change. Green Financial Resources exists to help you prepare for what's ahead, protect what you've built, and position yourself to move forward with confidence, no matter where you are starting.

Founded by Roger Green and now led alongside his son Andrew, we bring nearly 47 years of combined experience to every client relationship. We start by listening closely to understand your goals, concerns, and the decisions you're facing right now. From there, we guide you through your options, help you clarify priorities, and create a strategy to move you in the direction of your goals. The result is a plan that is practical, realistic, and designed to fit your life.

Some of What We Can Help With

- Investment & Allocation Advice
- Retirement Planning & Income Strategies
- Tax Reduction & Deferral Advice
- Insurance Planning & Risk Management
- Major Purchase & Cash Flow Decisions
- Charitable Giving Planning
- Legacy and Wealth Transfer Planning
- And much more

Green Financial Resources is a financial partner for every stage of life. Some clients work with us for a single transition, while many stay for decades. As circumstances change, we review plans, adjust strategies, and answer new questions, providing guidance for both practical decisions and major life moments like retirement or job changes.

Laura Green, our COO for more than 25 years, leads operations to ensure smooth, attentive service. She is supported by another 25-year staff member, Kelly Schmidt, and a team of experienced Client Service Managers and administrative staff. GFR's commitment to people and process has earned Best of Gwinnett for 11 years, Small Business Awards, including the 2024 Culture Creator award. Roger Green has been recognized with a 2018 Public Service Award from the Chamber, and Andrew Green was named a 35Under35 Gwinnett Young Professional in 2024.

Why Choose Green Financial Resources?

- Personalized Financial Strategies
- Experienced, Multi-Generational Advisors
- Education-Focused Planning Approach
- Ongoing Guidance Through Life Changes
- Dedicated Client Service Team
- Award-Winning Culture and Community Commitment

When you work with Green Financial Resources, you're choosing a firm that believes good planning should feel supportive, not intimidating. You get clear explanations, honest conversations, and strategies designed to serve you over time. No asset minimums. No pressure. Just guidance built around your goals and your future.

If you're ready to bring clarity to your financial decisions and confidence to what comes next, Green Financial Resources is here to help. Schedule a no-cost, no-obligation consultation by calling 770-931-1414 or visiting www.RogerSGreen.com. However life unfolds, we're ready to help you prepare, protect, and prosper.



CALL OR VISIT OUR WEBSITE!
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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.