

suwanee business community news and info

business



BUSINESS SPOTLIGHT

Green Financial Resources

Local award-winning financial firm provides individualized guidance with financial, investment, or retirement income needs. *PHOTOS BY ALEXIS DUNSTON*

ROGER GREEN, President and CEO of Green Financial Resources, LLC, has been helping people with their money for more than 35 years. Green Financial Resources (GFR) is an award-winning financial firm that grew out of Roger's dream to

serve all within his local community, and a business consisting of staff who share the same mentality. To reach as many people as possible, they require no asset minimums, provide no-cost initial consultations, and have offered retirement planning classes at local Gwinnett colleges since 1997. The

advisors at GFR have devoted many hours to meet with thousands to provide no-obligation individualized guidance. Whether you're seeking help with financial, investment, or retirement income needs, Green Financial Resources is dedicated to putting you first.

Your Financial Future

► Planning for your financial future is about more than just how to invest your money. GFR's advisors serve as a resource when you face questions about Social Security timing, insurance needs, 401(k) allocation, decisions about college funding, major purchases, harvesting from assets in retirement, legacy planning, and the multitude of additional financial questions that may arise. Form a long-lasting partnership with GFR and have ongoing access to experienced financial guidance. The Greens are committed to helping clients grow in financial security, stability, and education, and each of them has earned multiple degrees and designations to further expand their ongoing ability to do so.

Commitment to Service

► A family endeavor, Roger's wife, Laura, has served as GFR's COO since 2000, managing all staff, operations, and

service. Laura is supported by Kelly Schmidt, a 25-year employee, along with the rest of their fabulous team. Their overall commitment to service

is what transforms individuals into loyal clients. In recent years, two of Roger's sons, Andrew and Michael Green, joined the firm as advisors, helping to ensure the Green Financial legacy continues. Altogether, these three advisors have around 55 years of experience helping people with a wide range of financial needs — making it evident that GFR's customers are in exceptional hands.

GFR's vast array of awards has solidified them as one of Gwinnett County's premier financial firms. They've won Gwinnett Magazine's Best of Gwinnett Award for the past 11 years (2014-2024), and the Gwinnett Chamber's 2024 Small Business Culture Creator Award, as well as their Small Business of the Year Awards in 2008 and 2016. Roger has also been the recipient of a Chamber Public Service Award in 2018, along

with other recognition for his work in the community. These are a few of a long history of accolades, representing a broad focus on not only their clients, but also their internal culture and employees, and the overall community in which they serve.



BREWERY SPOTLIGHT: LINE CREEK BREWING CO.

Suwanee

JUL / AUG 25

2025 Best Sandwich Contest

11 LOCAL RESTAURANTS FACE OFF TO SEE THE WINNER!

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PLUS: PLACES TO CALL HOME GUIDE

BUSINESS SPOTLIGHT: GREEN FINANCIAL RESOURCES, LLC



The Green Financial advisors have a combined 55 years of experience helping clients with their financial and investment decisions.

retirement planning, investment decisions, and all those financial questions you will have along the way. ■

Take action now to help improve your financial future, even if all you need is a second opinion. For more information, visit RogerGreen.com,

call Green Financial Resources at 770-931-1414, or visit the office they've been in since 1997, located at 3700 Crestwood Pkwy. N.W., Suite 140, in Duluth.

Financial decisions are some of the most challenging decisions we make in life. Many will tend to procrastinate and waste opportunity. Some take action, but miss important

considerations that help maximize their planning. GFR has a proven track record of being here to help through life's ups and downs, and to be your source for financial and

Roger, Andrew, and Michael Green are all 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. All opinions are vetted using other available information. 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.