

Green Financial Resources, LLC/Roger S. Green

Roger S. Green should have the financial worries of the typical American citizen. He and his wife Laura have six beautiful children, a mortgage, automobiles in the garage, and financial obligations to everyone from the Church to Uncle Sam. With six children to clothe, feed, and put through school for several more years, it would be understandable if Roger and Laura were more than a bit apprehensive about the future and the financial burdens that it promises to unleash at various stages throughout the next decade and beyond.

Yet the Greens forge ahead in life with relatively few financial worries. The future is indeed bright for this family because after years of hard work and dedication to his field, Roger S. Green has managed to become one of the premier financial consultants in the country. And today, he shares the wealth of knowledge that he has accumulated with the citizens of Gwinnett County through Green Financial Resources, LLC with the sole purpose of helping others prepare for the future and most importantly, their retirement.

Planning for a lucrative financial future can be one of the most important and yet difficult tasks a person can undertake. At Green Financial Resources, each client's situation and needs are carefully analyzed to provide them with the utmost in proper planning for their individual financial success through a variety of different programs. In addition, the company has taken unique paths in reaching out to the people of Gwinnett County in order to not only insure their financial stability but to enrich lives.

The Company offers a wide variety of financial services that are crafted with the client's best interests in mind. Besides financial planning, Green Financial Resources offers investments and investment allocation; retirement planning with savings and withdrawal advice; college planning; 401K rollovers and allocation advice; estate plan-



Roger S. Green, a registered principal with IFG Network Securities, Inc., an ING Company.

ning; long term care, disability and life insurance coverages; small to midsize company retirement plans of all types; tax reduction and deferral advice; educational classes and consultations. By offering a host of financial assistance programs, Green Financial Resources has earned a reputation for being able to supply each customer with the proper tools they need for a successful financial future.

Roger S. Green was a success story from the time he first entered the world of financial planning, crafting his trade as a representative in Houston, Texas. He became a registered representative with MONY Securities Corporation/Mutual of New York and stayed affiliated with the Corporation as an independent representative for almost ten years. During his affiliation there, Roger was a top representative from almost the beginning of his career and was awarded the first Theodore Shalak Award for exemplary client service and exceptional client persistency, a most respectable honor for such a young man.

After a few years, Roger relocated his family to Gwinnett County. With a steady surplus of great schools, nice neighborhoods and strong youth athletic as well as other programs available, Gwinnett County is a natural home to young families, retired couples, and everyone in between those age brackets. Roger's

Roger Green receiving the "Top Representative" award from Jack Conley, President of IFG Network Securities, Inc.





Green Financial Resources staff: Clockwise from bottom left: Bo Lake, Renae Nelson, Kelly Schmidt, Judy Barron, Jason Piper, Roger Green, Betty Huff, and Laura Green. *Photo by Allison Lawrence*

desire to operate his business as close to his family as possible was a major factor in the relocation of Green Financial Resources. The move also allowed Roger to devote more time to volunteer his services at his church, as well as to better serve the community that he and his family call home.

Since moving to Gwinnett County, Roger S. Green and his business have maintained a respectable profile in the community, benefiting thousands of individuals through a variety of different programs aimed at helping people get the most for their money. It is important to note that Green Financial Resources does not incorporate investment minimums. The company serves a diverse clientele, from hard working couples with young children seeking to provide for more secure futures, to widows who need help dealing with major changes in their financial responsibilities, to retirees looking to continue to grow their assets to meet their needs throughout retirement, to business owners needing financial advice and benefit plans to improve their business situation in conjunction with their own personal financial planning. Roger's education and vast knowledge enable him to provide assistance to anyone in any situation. Roger's goal is to help as many people as possible improve their financial situation through careful planning.

Roger is a firm believer in the value of education and goal setting when it comes to helping his clients make informed financial decisions. With an intense focus on educating citizens about their

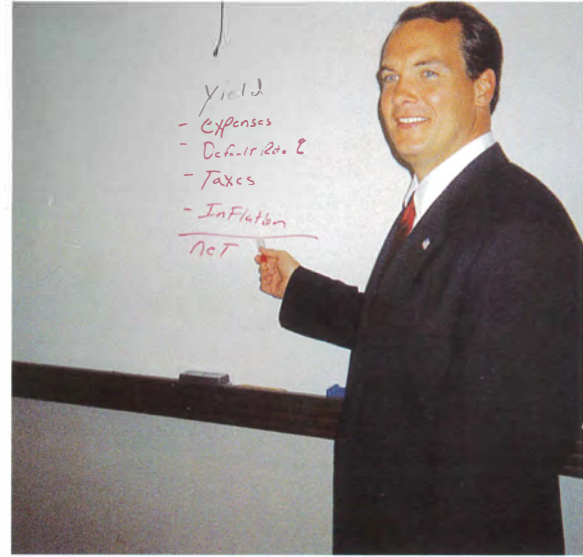
finances by teaching classes regularly at Gwinnett Technical College, The University of Georgia's Continuing Education Facility at Gwinnett University Center, and at First Baptist Church of Snellville. These class formats focus on teaching clients how to allocate their assets in a diversified way, creating a "Harvesting Plan" that can allow them to retire more comfortably. The courses also spend time focusing on such topics as true diversification of your assets; how to withdraw from diversified assets in your retirement; how to minimize the Negative impact of inflation and taxes; how underestimating the impact of inflation and taxes can hurt you; the power of compounding and the Rule of 72; the main reasons people fail, so you can avoid them; how to factor Bear Markets into your strategy; Roth IRA's versus regular IRA's, and which would best suit the individual client's needs; how to limit the effect taxes have on your IRA; protecting against the financial drain of Long Term Care; understanding minimum distributions; and estate planning made easy. These classes have proven to be a boon to the individuals who sign up to take the classes, in that each person walks away from the class with a better understanding

of the work and the sacrifices that it will take in order to plan for a better financial future.

Roger Green is a certified instructor of the “Bible-Based Money Management™ Seminars.” In these classes, he teaches that as Christians, each of his students look to the word of God for guidance and inspiration on matters of family, work, and relationships, practically everything in their lives and that money management should not be an exception. In these seminars, students learn how to become a good steward of all the resources that God has bestowed upon them. It is not only a beneficial seminar for everyone who attends, but also manages to be an uplifting experience for all.

Demonstrating his commitment to ongoing education, Roger S. Green holds a Master of Science in Financial Services degree. He has proven himself to be a strong believer in the value of ongoing career-related education. Graduate level work has earned him certificates in Financial Asset Management and in Pensions and Executive Compensation, while his ongoing educational focus has enabled him to earn the professional designations of CERTIFIED FINANCIAL PLANNER (CFP™), Certified Fund Specialist (CFS), Certified Senior Advisor (CSA), Board Certified in Mutual Funds (BCM), Chartered Financial Consultant (ChFC) and Accredited Estate Planner (AEP). Roger is licensed and registered in the state of Georgia and numerous other states to provide a full range of investment and insurance advice.

“My job is to help people be specific about what their financial



Roger teaches classes that are sponsored by Gwinnett Technical College in their continuing education program.

goals are,” Green says. “And then to help them figure out how to successfully achieve those goals. Our vision here at Green Financial Resources is to change the nature of financial planning to customized solutions, not fitting people into packaged programs. We view financial planning from a “big-picture” perspective, looking at the client’s overall situation. We continually strengthen our knowledge of the ever-changing financial marketplace so that we will be the best possible resource to our clients. We look to help as many people as possible bring their retirement planning to a higher level.”

In addition to the classes he teaches at both the colleges and churches, as well as through his business, Roger S. Green is also the host of the popular weekly radio program “Your Green” on WNIV at 970AM and 1400AM which is broadcast each Saturday afternoon at 2 p.m. Through this one-hour program, Roger has been able to help many people of all ages and incomes maximize their savings and reach their retirement goals by using time-tested concepts designed for retirement planning. Most importantly, however, preparation for the radio program helps to ensure Roger stays knowledgeable and informed for his clients.

Roger S. Green is also involved heavily with several professional organizations including the Society of Financial Service Professionals and The Financial Planning Association. He passed a rigorous screening process to be named as a National Football League Players Association (NFLPA) Registered Player Financial Advisor. A Gwinnett County resident since 1991, with his office located in Duluth, Roger is also a member of the Gwinnett Chamber of Commerce. Roger is an active volunteer in the First Baptist “Career Crossroads” ministry for the unemployed and those seeking a career change, and was selected to serve as the Leadership Campaign Coordinator for a \$10-million-dollar capital



The Snellville Baptist Church was organized August 12, 1882. Dr. James Merritt, former President of the Southern Baptist Convention, is the Senior Pastor of this thriving Gwinnett County church. The church is expanding by opening a second, larger location near the Gwinnett Civic Center. Roger Green was selected to be the Leadership Campaign Director for the funding drive to support this new church and for maintaining the existing church. The new church, to be called Crosspointe, will seat 6000 in the main sanctuary upon its completion.

campaign to build Crosspointe Church near the Gwinnett Civic Center, and to retire the debt on the Snellville church location.

Roger has also always focused on a tradition of excellence in his service to clients. This tradition is best displayed through the numerous awards that have been bestowed upon him throughout his years in the business. Among the awards that Roger S. Green has accumulated are the aforementioned Theodore Shalak Award—MONY's best record of client persistency and service; the Top Representative for IFG Network Securities, Inc. in 2000-2001, 2001-2002 and 2002-2003; the Top Representative in 1999 for

MONY Securities; the Top of the Table (MDRT) for 5 Years; the Court of the Table (MDRT) for 2 Years; the Million Dollar Round Table (MDRT) for 10 Years; the MONY Forum in 1998-1999; the Client Builder Award for 1997-1998; the MONY Equity Leader for 1995; the MONY "Top 50 Club" for 1993-1994; the MONY IFS 2nd Year Challenge Leader for 1992; the MONY President's Council for 1991-1992; the MONY Top Club for 1990-1991; the Representative of the Year in the Houston Office for 1990 and the Rookie of the Year in 1988-1989.

Naturally, with accolades such as these, Roger has staffed his business with a stellar Client Service Team of seven dedicated employees. Roger's wife, Laura, manages the day-to-day operations of the business and manages the service team responsible for providing and ensuring client service. Jason Piper, who is also a Registered Representative with IFG Network Securities, Inc., serves as Roger's professional associate. Jason works diligently with Roger and the service team on all client matters. Betty Huff, Judy Barron, Kelly Schmidt, Bo Lake and Renae Nelson all provide additional support in various facets of the day-to-day business operations and client service. Roger credits much of his success to the support and dedication of his team, a team that allows him time to focus on providing financial advice and maintaining his ongoing education, while maintaining his dedication to church and family.

Through the lessons taught in each of Roger S. Green's classes through the programs at the First Baptist Church of Snellville to the wide influence wielded by the radio program and the direct meetings with the clients who are in need of financial tips and assistance, Green Financial Resources will continue to make a tremendous impact on the lives and especially the golden years of Gwinnett's residents.



Roger recording the "Your Green" radio program at WNIV 970 AM studios in Atlanta. Photo courtesy of Ultimate Image Concepts/JD Moor photographer