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- Roger Green, President and CEO,
Green Financial Resources

Green Financial Resources Aims to Help Others

As President and CEO of Green Financial Resources LLC — an award-winning financial advisor in Duluth with more than 25 years of experience — Roger Green said the desire to help people understand investment planning drives him and this award-winning business.

It's this type of customer focus that he sought when building his team — a group of service-oriented individuals working together to ensure Green Financial Resources “runs like a Swiss watch.”

“Everybody on our staff has a unique talent or skill set, complementing one another” Green said, adding that wife, Laura, is integral as the Chief Operating Officer, pulling all aspects of the business together and helping to utilize the team talents where they are most effective.

It's likely one of the major reasons the business has garnered so many accolades. But what's the key to their success?

“It's about helping people. Jason Piper and Tim Conway are on my staff to support me in providing financial and investment advice. We offer those services to all who seek our help, with no investment or asset minimums. Like coaches, sometimes we have to give advice about changing behaviors or viewing things from a different perspective. Sometimes we just help overcome procrastination, or help clients stand firm during market ups and downs so they can try to pursue long term capital appreciation — our primary investment goal. The rest of my administrative staff works diligently to ensure a stellar all-around customer experience.

Customers come to the business seeking advice that

runs the gamut: financial and retirement planning; investments and investment allocation/diversification; savings and withdrawal advice; estate planning; trusts; long-term care, disability, and life insurance coverage; small- to mid-size company retirement plans; tax reduction/deferral advice; and charitable giving strategies.

The advice offered at Green Financial reaches beyond the confines of the company's office. Green uses the written word, radio waves and the classroom to spread the message of sound financial planning. His column and radio program, “Your Green” runs in the *Gwinnett Citizen* and airs on WNIV at 970AM (www.wniv.com) from 3-4 PM on Saturdays. Both aim to keep readers and listeners up to date on the latest financial topics and news.

Through the continuing education classes he teaches at Gwinnett Technical College, Green seeks to educate all about retirement and investment planning, focusing on the importance of allocating assets in a diversified way and creating a “harvesting plan” designed to help assets last longer in retirement.

“It's one of the main ways I discuss investing for retirement,” Green said. “I think about the process of planting a crop, and then waiting until it's ready to harvest it. You wait until the time is right. That's essential.”

For the success of his business, Green gives thanks to God. “I believe God has given us all gifts, and it's our duty to use and share these talents. My talent is helping people with their money, and my goal is to help as many people as possible — live their dreams, worry less, give to others, and leave a legacy when they go.



Staff of GFR Clockwise From Top Left: Jason Piper, Laura Green, Roger Green, Stewart Fogleman, Skyler Hoshall, Erina Patterson, Betty Huff, Emily Green, Marc Sporn, Hillary Murray, Kelly Schmidt, Brittany Knowles, and Tim Conway.

Accomplishments:

- One of the Top 1000 Advisors in *Barron's Magazine* each year from 2009-2013
- One of five advisors nationally added to the 2009 Advisor Hall of Fame in *Research Magazine*.
- One of America's Top 100 Independent Advisers in *Registered Rep Magazine*, 2007-09 and 2011
- One of the Top 100 Independent Financial Advisers - *Barron's* 2007 and 2008.

- One of five finalists for the 2005 and 2006 Gwinnett Chamber of Commerce Small Business Person of the Year.
- Green Financial Resources, LLC won the Chamber Pinnacle Small Business of the Year award in the 1-9 employee category in 2008
- Green Financial was named as a top 25 finalist for the Gwinnett Chamber Pinnacle Small Business of the Year Award each year from 2009-13.
- Green Financial one of Atlanta's Top 20 Financial Planning & Advisory Firms (based upon Assets Under Management)- *Atlanta Business Chronicle* 2003

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