About LPL Financial

LPL Financial is the nation's largest independent broker/dealer.* LPL offers its financial advisors thorough research and a comprehensive array of tools, resources, and technology. Because LPL Financial has no proprietary products to sell, its advisors have the freedom to offer you thoughtful financial guidance and investment recommendations.

* As reported by *Financial Planning* magazine, June 1996-2019, based on total revenue.

Green Bee Advisory
Catherine Valega, CFP®, CAIA
Wealth Consultant
130 Turner Street, Bldng 3, Ste 230
Waltham, MA 02453
781-577-2250 Office
cvalega@greenbeeadvisory.com
www.greenbeeadvisory.com

Green Bee Advisory

CPS-31485-0619 Tracking #1-860768 (Exp. 05/21)

PURSUING FINANCIAL INDEPENDENCE

Our Process for Crafting Your Personal Plan

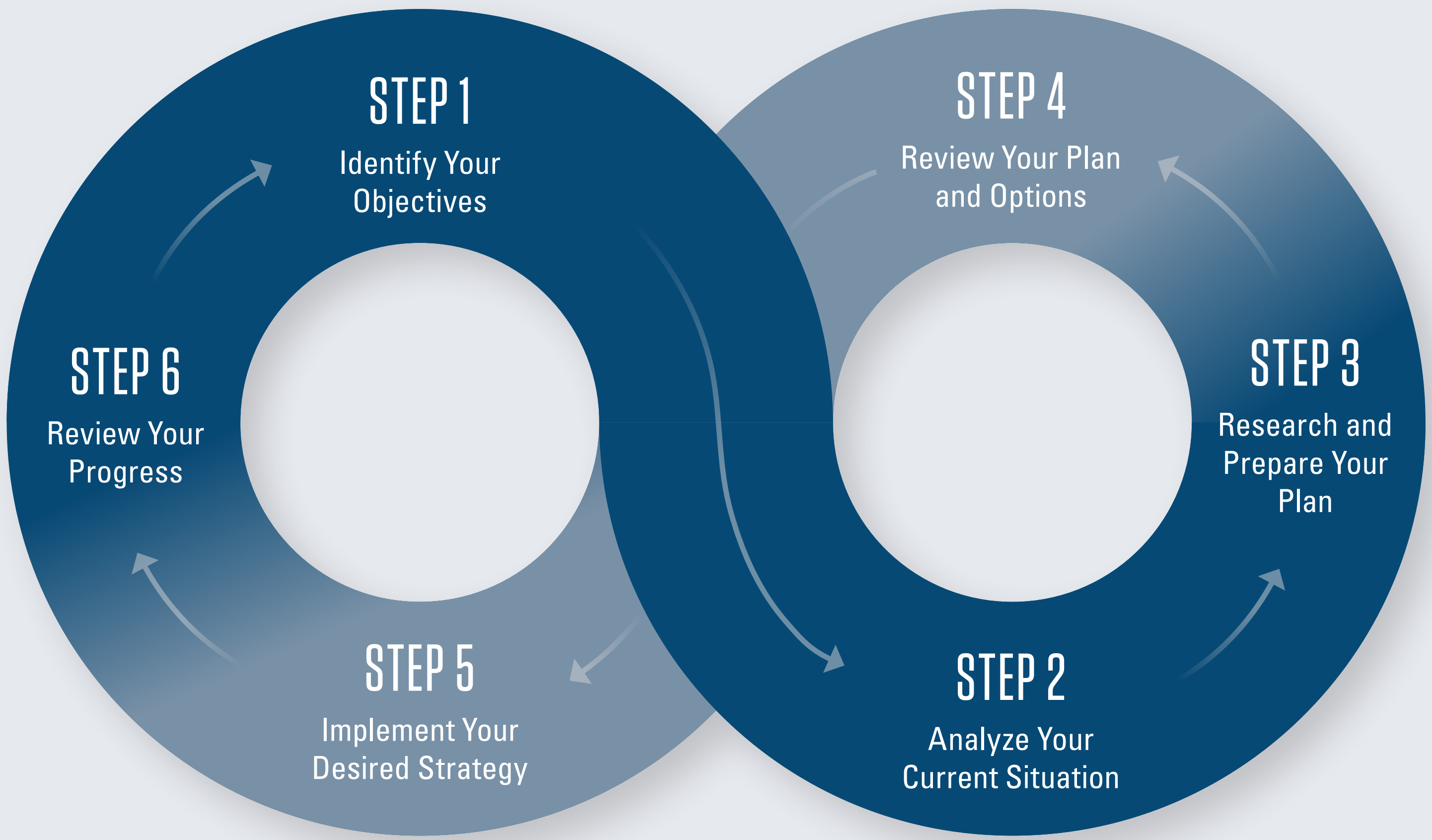
Green Bee Advisory

Our Mission

We're committed to helping you pursue financial independence, a successful retirement, and a lasting legacy.

Our Process

The goal of the financial planning process is to give you control of your financial circumstances, enhance your quality of life, and reduce uncertainty about your future. We follow six steps to help you create a financial plan to work toward your financial freedom.



We begin by helping you identify your goals and evaluate where you are relative to those goals. We evaluate your options and recommend strategies to help you get you where you want to be. We don't stop there. We help you implement the recommendations. Then, we continually monitor your financial situation to ensure you remain on track to pursue your financial dreams.

Benefits of Professional Financial Advice

As independent financial professionals, we take the time to learn about your needs, hopes, and concerns. Then we develop a comprehensive strategy to help you pursue your dreams. Whether your goals are simple or complex, you need a plan that includes a realistic strategy, actionable steps, and expert advice to help you navigate the journey to your success.

To optimize your results and help you work toward your financial goals, we combine a comprehensive planning approach with technology. We believe your whole financial situation should be coordinated into one overall plan that helps you achieve the goals that are most important to you. We will use our technology to help you understand how it all integrates together.

Unexpected events and life changes can alter your dreams. That's why we focus on you and your unique set of circumstances. Building a lasting relationship with you and your family allows us to create a customized strategy aligned with your short- and long-term objectives, and to help you adjust when those change.

There is no assurance that the implementation of a financial plan will yield positive outcomes. The purchase of certain securities will be required to affect some of the strategies. Investing involves risk including possible loss of principal.

Client-centric Approach

The world of finances can be complicated. That's why we leverage our expertise and training for a client-centric, holistic approach to financial guidance that reflects your priorities and life circumstances.

Using our discovery process, we work with you to create a personalized financial strategy that supports your objectives, then monitor it to help you stay on track.

We can help with:

- Retirement planning
- Business strategies
- Investment planning
- Small business strategies
- Estate planning
- Education planning
- Tax strategies
- Gifting strategies
- Risk management