FOR WHAT INSPIRES YOU

Green Bee
Advisory

WHAT INSPIRES YOU?

WHAT INSPIRES YOU INSPIRES OUR FINANCIAL GUIDANCE

What inspires you? How should your wealth affect what inspires you?

Together, we'll explore your opportunities and choices to develop a truly personal approach to your financial and personal aspirations. You'll not only gain strategies with the goal of helping you grow and preserve your assets, you'll also gain personal financial management for leaving behind a legacy—you can positively impact what inspires you today and for generations to come.

Simply put, what inspires you inspires how we help you manage your wealth.

INSPIRED PARTNERSHIP

In addition to our firm and team, our association with LPL Financial provides the experienced resources and insights of LPL Private Client, so that we can deliver a truly holistic approach to your unique wealth management and legacy goals.

LPL Financial is the nation's largest independent broker/dealer.* As an independent firm, LPL Financial offers access to a wide range of non-proprietary products and services. With $628 billion in advisory and brokerage assets,** LPL provides the technology and breadth of services to support our commitment to your wealth management. Equally important, LPL Research is one of the largest and most experienced research groups among independent brokerage firms.

* As reported by *Financial Planning* magazine, June 1996–2019, based on total revenue.
** Based on publicly filed information as of December 31, 2018


OUR SERVICES
Foundation and endowment guidance
Comprehensive financial planning
Advanced estate planning
Investment consulting
Advanced portfolio and investment analytics
Tax-sensitive investing
Alternative investments
Trust services
Single-stock risk management
Executive compensation arrangements
Business exit planning
Financial windfall planning
Insurance planning

INSPIRED SUPPORT

Your success inspires every facet of our service to you. This commitment is reflected by creating tailored, proactive strategies that address the many complex issues of managing your wealth successfully. Not only will we communicate with you regularly and partner with you on your choices as factors change and goals evolve, we'll also make ourselves available whenever you want to discuss your wealth.

1

Understanding

Our process begins with listening. When we gain a deep understanding of your values, we can better develop choices that reflect your financial philosophy, address your specific goals, and bring purpose to your wealth.

2

Holistic approach

The next step is to build your customized, integrated wealth management solution through a multidisciplined, holistic approach that includes asset management, estate planning, philanthropy planning, and investment strategies. Our approach also employs key investment principles such as diversification and asset allocation for managing risk.

3

Evolution

Once your wealth management strategy is implemented, you'll continue to enjoy informed collaboration to adapt your strategy to changing markets and priorities.

There is no guarantee that a diversified portfolio will enhance overall returns or outperform a non-diversified portfolio. Diversification and Asset Allocation do not protect against market risk.

INSPIRED COLLABORATION

Managing your wealth to your unique and specific goals means delivering a collaborative experience that includes:

Objective guidance

We have no proprietary investment products to sell or financial relationships to promote. Our recommendations place your interests first.

Philanthropic insight

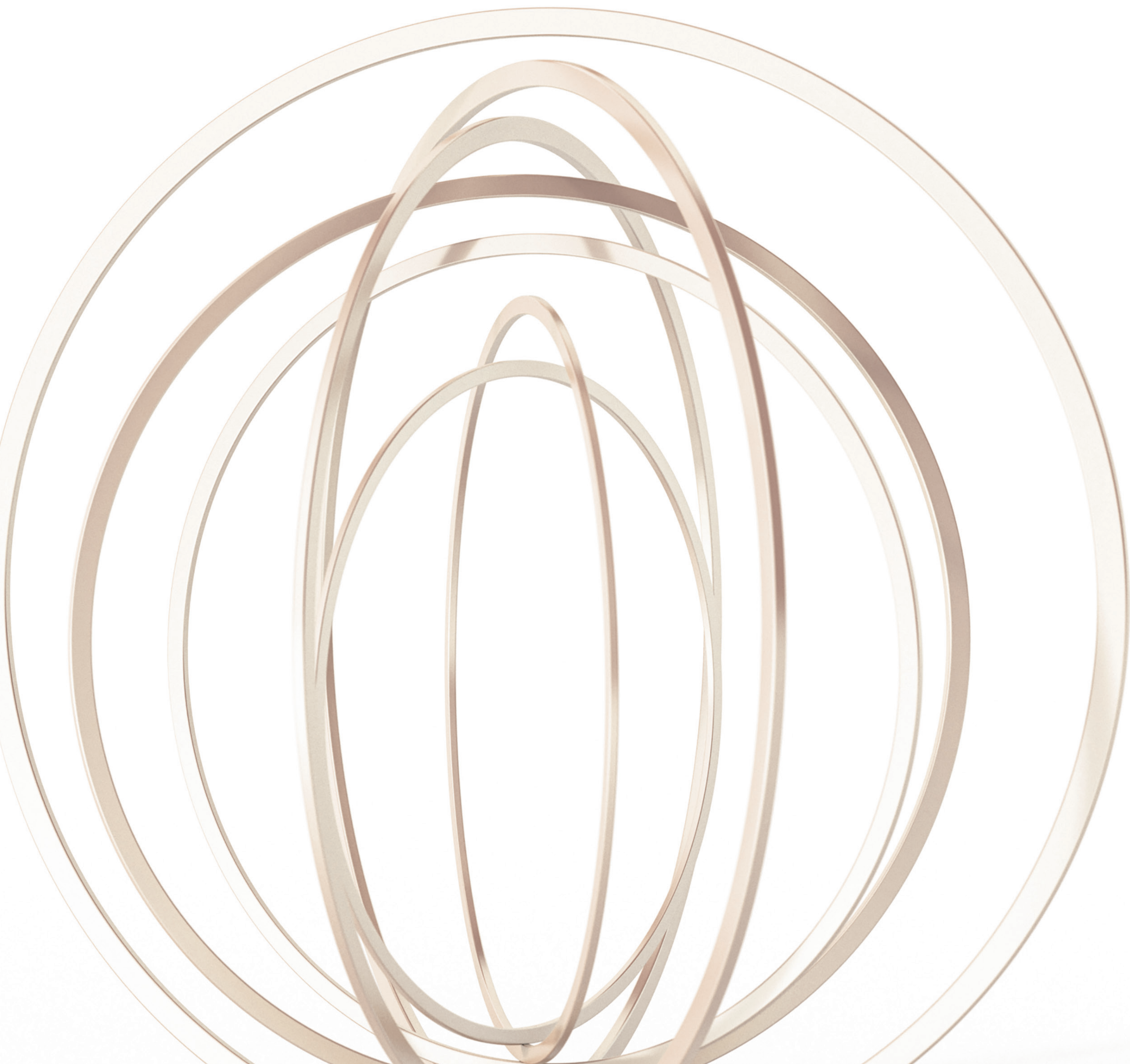
To help you plan your legacy, we offer innovative resources to help you provide for your favorite charities and endowments.

Innovative strategies

By gaining a true understanding of your unique objectives and challenges, we then tailor investment approaches specific to your needs and desired outcomes.

Collected expertise

You gain access to a network of trusted tax, legal, and insurance professionals to support all facets of your wealth management.



INSPIRED COMMITMENT

With the goal of helping you preserve your wealth, craft your legacy, and empower you to pursue that which inspires, our firm's sole purpose is to deliver exceptional, objective financial guidance and the highest caliber of personal service to you.

We look forward to learning how we can best reflect that commitment to you and learn what inspires you.

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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

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Securities Investor Protection Corporation (SIPC)

The LPL Financial SIPC Membership provides account protection up to a maximum of $500,000 per customer, of which $250,000 may be claims for cash. An explanatory brochure is available at www.sipc.org. Additionally, through London Insurers, LPL Financial accounts have additional securities protection to cover the net equity of customer accounts up to an overall aggregate firm limit of $575,000,000 subject to conditions and limitations. The account protection applies when an SIPC member firm fails financially and is unable to meet obligations to securities clients, but it does not protect against losses from the rise and fall in the market value of investments.

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PC-79472-0919 Tracking #1-826536 (exp. 09/21)