From left: Karl Hambrecht, Susan Fisher, Andrea Hottleman, Jonathan Busa, Michele Russell, Stephen Stabile, Kevin Smith, Veronica Caulfield, Paul V. Ryan, Jr., Scott Facchetti, Susan Big, Tam Van Tran, Dana E. Bernard, Steve Davis, Maja Stojanovic, Philip Reed, Barbara Reed

New England Financial Advisors Take Team Approach to Customer Care

Group of Colleagues Combines Strengths to Meet Clients' Needs

Look no further for an excellent example of strength in numbers. With this 37-member team of professionals come strengths to serve clients' varied financial planning and wealth management needs.

Andrea Hottleman of T.H. Hottleman and Associates says, "I count these fellow advisors as colleagues and resources." Connected by their broker-dealer affiliation, through which they offer securities, insurance and advisory services, all are independent and have their own successful practices.

Depth of Experience

They work together, to their clients' benefit. "We can offer more to our clients because we're all connected," says Dana E. Bernard of Topsfield, Massachusetts. "We're stronger because we're a team."

The group's members help one another, offering information and suggestions in the areas where they are most experienced. One may focus on accounting and tax matters, for example, while another may have experience with equity investments. Others have expertise in life insurance, long-term care coverage or estate planning matters.

That's the beauty of the collaboration – a cooperative of sorts, a team. "We've been working together for 20-plus years," says Karl Hambrecht of Hambrecht Associates. "We trust each other. I reach out to them for advice for our clients when I know they're better versed in a particular area, and vice versa."

Security in Support

This group of like-minded colleagues was formed over many years while emphasizing the advisors' independent businesses and their own clients. They came together because they share a common philosophy and approach to personalized customer care. "When you come to us, you get the experience of all of us," say Barbara and Philip Reed of Reed Financial Group.

Clients gain an extra measure of confidence from this approach, because a larger group backstops their own advisors. But there's more to it than that. These advisors are solid professionals, and they share a commitment not only to the work – the group is entrusted with over $1 billion in client assets – but also to the way they do it. "There is a mindset, a positive culture here, where our clients are our first priority," say Michele Russell and Jonathan Busa of Ceres Financial Group.

Continuity Through Change

As an example, most of the advisors have established "cross-succession" plans. If a group member retires or is for some reason unable to serve clients, others are prepared to step in and prevent service dips in their accounts.

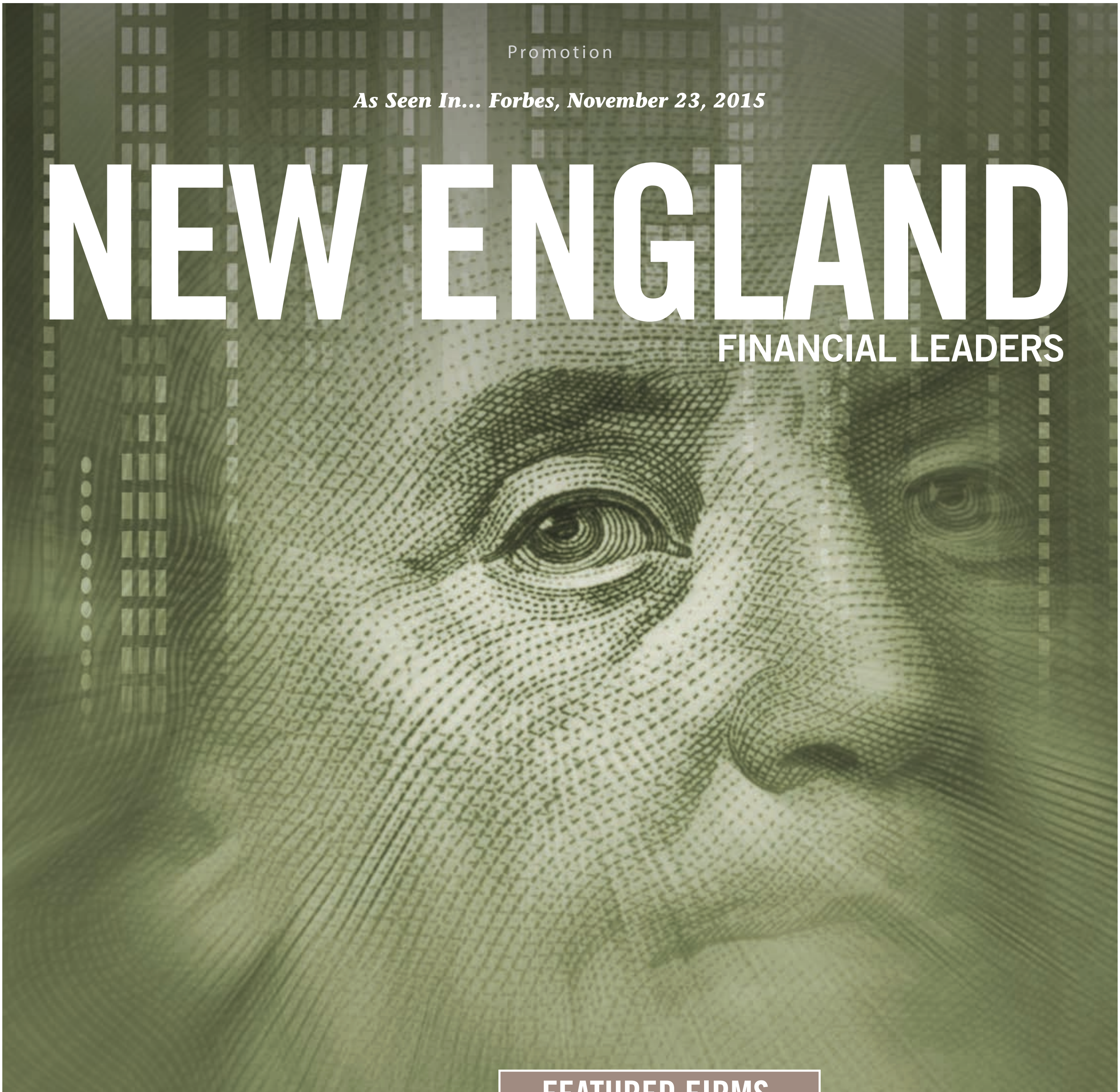
Paul V. Ryan, Jr., CFP®, founder and managing director of Flagship Wealth Advisors, LLC, offers wealth management, along with financial planning for income, retirement, education, estate and tax matters. Every portfolio is tailored to the client's needs and goals. And clients gain the added benefit of access to a network of caring, seasoned financial professionals. "I trust all my colleagues," he says. "I would trust them to provide for my clients if something happened to me. My team would care about them."

301 Edgewater Place, Suite 400 | Wakefield, MA 01880 | 800-631-9997 | FlagshipFA.com

Promotion

As Seen In... Forbes, November 23, 2015

NEW ENGLAND
FINANCIAL LEADERS



FEATURED FIRMS:

On the following pages, you will read about some of the most experienced and most trusted financial firms in New England. Whatever your short- or long-term goals, the right financial professional can help you turn your dreams into reality, while taking steps to help protect you and your family from the unexpected and transfer your wealth to the next generation according to your wishes.

The Retirement Financial Center
RetirementCtr.com

Flagship Financial Advisors, LLC
FlagshipFA.com

Measured Wealth Private Client Group, LLC
measuredwealth.net

The Berry Group of Wells Fargo Advisors
berrymachnowski.com

The Sterling Group at Morgan Stanley
morganstanleyfa.com/thesterlinggroup

Twelve Points Wealth Management
TwelvePointsWealth.com

Telge & Hamel Financial
telgehamelfinancial.nm.com