

Opening Remarks

Welcome to the Spring 2022 edition of The Insider from The Bulfinch Group. As challenging as these past two years have been, we continue to be true to our core values of Be Professional, Give Back, and Have Fun. We wish you and your families health and happiness as we “spring” ahead. **We hope you enjoy this glimpse into some of the recent initiatives and upcoming events at The Bulfinch Group:**



From Left to Right: Thomas Harmon, CLU®, ChFC®, Senior Vice President, Partner; Seth Medalie, CLU®, ChFC®, President; and Kevin Schneider, CLU®, Executive Vice President, Partner.

Be Professional

TeamWorks

Management team members attended TeamWorks, an annual conference bringing together our peers from around the country to share best practices and gain new perspectives.



LBS® Forum

Bulfinchers took part in the educational Living Balance Sheet® Forum, a productive session to further expertise in wealth management and client relationship excellence. The team enjoyed exploring San Antonio in our down time.



Diana's Retirement

Diana LeTourneau retired, our Director of Policyholder Services, after 30 years of service. We all gathered to wish her well and celebrate her hard work and dedication. We wish Diana the best of luck on a well-deserved retirement.



Give Back

Circle of Hope Warm Up Drive and Food Drive



Bulfinchers helped to spread holiday cheer by participating in our annual Warm Up Drive, donating warm clothes, toiletries and facemasks to Circle of Hope, a nonprofit organization based in Needham. **Circle of Hope** distributes necessities to twenty homeless shelters and clinics in Boston and MetroWest.

We also continued the spirit of community impact by donating over 145 pounds of food to **Needham Community Council's Food Pantry**. Together, we made a difference, helping serve the 350 individuals which rely on the Food Pantry each week.



Associate Spotlight



Jonathan Pierre

NAIFA Massachusetts 4 Under 40 Award

Congratulations to Jonathan Pierre for the prestigious National Association of Insurance and Financial Advisors – Massachusetts (NAIFA Massachusetts) 4 Under 40 Award*! This annual award recognizes four top young financial professionals in Massachusetts under the age of forty. JP's passion is showing current and prospective clients new and more efficient ways to implement their planning. JP, we are proud to see you earn this prestigious award.



Previous 4 Under 40 Award* Recipients:



Andrew Guyton



Leigh McCloskey



Brian McGrath



Yan Katz

*This award is not issued or endorsed by Guardian or its subsidiaries.

We're Hiring!

We are looking for professionals who are driven and seeking a meaningful career, to join our team of Financial Representatives. Please visit our website and click the careers tab for all job descriptions. Don't forget to keep your eyes and ears open so you can refer future Bulfinchers!



Over half of employees open to changing jobs; majority still want workplace flexibility

According to Grant Thornton's new State of Work in America survey, 29% of full-time employees are actively looking for a new job at a different company. Moreover, the survey reveals that over half (51%) of employees are not actively looking for a new job but would consider a switch if the opportunity arose.

Source: <https://www.businesswire.com/news/home/20220407005321/en/Grant-Thornton-survey-Over-half-of-employees-open-to-changing-jobs-majority-still-want-workplace-flexibility>

Have Fun

March Madness!

What a great way to kick off March Madness and end the work week! Bulfinchers gathered together to watch March Madness games combined with great food and lots of camaraderie. A big shoutout to Ward 4 in Newton for hosting us!



2022 Bulfinch Holiday Party

The Bulfinch Group “safely” celebrated the holiday season. We were lucky enough to hold our annual Holiday Party in a Covid-safe environment this year where we enjoyed cocktails, dinner, dancing but more importantly, friendly in-person cheer and camaraderie at the beautiful Charles River Country Club.



2022 Charitable Golf Tournament



GOLF OUTING

THE BULFINCH GROUP - *Charitable Foundation*

Save the date for the 14th Annual Charity Golf Tournament to be held on Monday, June 13th, 2022 at TGC Sacconneset in Falmouth, MA. Always a wonderful day of golf with proceeds benefitting many worthy nonprofits including Riverside Community Care, Beth Israel Deaconess Hospital-Needham, Dana Farber, The Jimmy Fund, Alzheimer’s Association, and more! There are still sponsorship opportunities. Check them out at: <https://birdease.com/bulfinchgolftournament>



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