

Opening Remarks

Happy New Year! We hope you enjoy this Winter 2023 edition of The Insider from The Bulfinch Group. The Insider is a glimpse into how Bulfinchers live our core values of Be Professional, Give Back, and Have Fun. This includes always raising the bar in terms of our professional development, gathering donations for food and clothing drives in our community, and enjoying each other's company at events such as our annual holiday party. We wish you and your families health and happiness as we look forward to the year ahead.



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

Women's Leadership Summit



Bulfinchers participated in Guardian's Women's Leadership Summit in Denver, exchanging best practices, sharing ideas, and making new friends. On the first night, participants rolled up their sleeves and stuffed bags for MEGHANS WISH FOUNDATION. Together, 65 emergency tote bags were packed and shipped out to Colorado children as they enter the Foster Care system. Every bag contained a change of clothes, a pair of pajamas, toiletries, toys, books, and a card of encouragement. An incredibly powerful and impactful summit for sure!

Teamworks

Leadership team members gathered to attend TeamWorks in Sarasota, FL. TeamWorks is an annual conference bringing together our peers from around the country to share ideas and gain new perspectives.



15TH ANNUAL GOLF OUTING

THE BULFINCH GROUP
Charitable Foundation



2023 Charitable Golf Tournament

Save the date for the 15th Annual Charity Golf Tournament to be held on Monday, June 12th, 2023 at Saconnesset Golf Club 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! Check out our sponsorship opportunities at: <https://birdease.com/bulfinchgolftournament>

Give Back



14th Annual Charity Golf Tournament

Our 14th Annual Charity Golf Tournament, held in June at the beautiful Sacconnesset Golf Club in Falmouth, was a HUGE success. We raised \$80K for The Bulfinch Group Charitable Foundation, an all-time record which will help many nonprofits throughout our area. We are very proud to say that our Foundation continues to make a difference in the communities we serve. Hope to see you for the 15th Annual Charity Golf Tourney on Monday, June 12, 2023!

Breast Cancer Awareness Month



Bulfinchers, both survivors and supporters, were tickled pink to show their support for Breast Cancer Awareness month.

Warm Up Drive and Food Drive



Bulfinchers helped to spread holiday cheer this season by participating in our annual Warm Up Clothing drive. Our warmup drive benefits Circle of Hope, a nonprofit organization based in Needham. Circle of Hope helps provide clothing and toiletries to 25 homeless shelters, healthcare



clinics, universities, and other programs throughout Greater Boston and Metro West.

Bulfinchers also continued the spirit of community impact by donating nearly 250 pounds of non-perishable food to Needham Community Council's Food Pantry via our annual food drive. The number of people reaching out to the Pantry for help continues to climb. Together, we made a difference, helping serve the 307 households and 672 people who rely on the Food Pantry each week.

Have Fun

Friendsgiving



Nearly 50 Bulfinchers gathered for our first Friendsgiving lunch, catered by Bakers' Best Catering. There was much laughter and camaraderie throughout the delicious feast. And for those Bulfinchers who joined our firm in the last year, it was nice to meet some of our veteran Bulfinchers for the first time in person. We look forward to continuing the tradition of Friendsgiving in the years to come.



Spartan Challenge – Fenway Park



Spartan strong! 18 Bulfinch Spartans gathered at Fenway Park on a rainy day in November, to challenge themselves as part of The Bulfinch Group Team at the Spartan 5K 20+ obstacle course.



This athletic challenge was no easy feat, but extremely rewarding for all participants, as you can clearly see by the smiles and true grit.

2022 Bulfinch Holiday Party

Bulfinchers gathered for our annual holiday party at the beautiful Charles River Country Club this past December. The annual event did not disappoint - the celebration was filled with laughter and an abundance of smiles. And this year's "secret" fun-filled activity featured a gourmet cotton candy boutique!



Associate Spotlight



Andrew Altenbach, RICP® NAIFA Massachusetts 4 Under 40 Award



Congratulations to Andrew Altenbach 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. Andrew's passion is showing current and prospective clients new and more efficient ways to implement their planning. Andrew, we are proud to celebrate you as our most recent Bulfincher to receive this prestigious designation.

Previous 4 Under 40 Award* Recipients:



Jonathan Pierre



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!



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