

## Opening Remarks

We hope you enjoy this Spring 2024 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. With great pride and gratitude, we recently celebrated the 30th anniversary of opening the firm. We feel honored to reach this milestone and we sincerely appreciate the trust our clients place in us as we work tirelessly to exceed expectations. It is an honor to work with our dedicated associates who care so deeply about their clients and the community in which we serve. Together we will continue to accomplish great things.



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

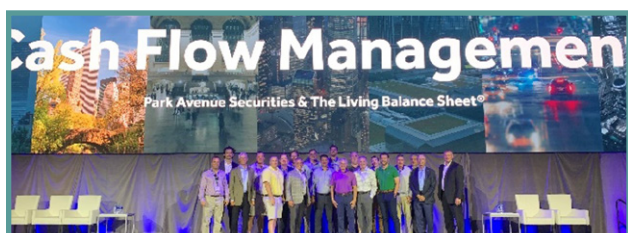
### Teamworks

Management team members gathered to attend TeamWorks in Atlanta, GA. TeamWorks is an annual conference bringing together our peers from around the country to share best practices and gain new perspectives.



### Cash Flow Management Conference

Advisors recently attended the Cash Flow Management conference collaborating with colleagues from across the country. Bulfinch Group advisors continually attend professional development initiatives to stay informed of all the most advanced financial services tools available.



## Five Star Wealth Managers / Investment Professionals

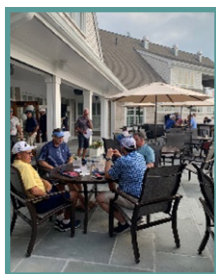


### Congratulations to our Five Star 2024 Designees

Congratulations to this year's Five Star Wealth Manager and Investment Professional Award Winners — annually awarded by Five Star Professional and featured in the March Issue of Boston Magazine. This award is given to advisors who demonstrate experience in the financial services industry and an outstanding service dedication to their clients. Wealth Manager Award winners are: Amy Lampert, Ari Stonehill, Barry Zimmerman, Bob Furlong, Brad Champion, Brian McGrath, Darren Violette, Gary Peters, Gracio Garcia, John "Jake" Akoury, John Balzer, Kevin Schneider, Leigh McCloskey, Mark Poitras, Martin Lowenthal, Michael Hertz, Michel Scheinmann, Richard Belofsky, Richard Howell, Tom Harmon, Yan Katz and Zvi Shtifter; Investment Professional Award winners are: Peter Klay and Peter Magni.

## Give Back

### 15th Annual Charity Golf Tournament



Our 15th Annual Charity Golf Tournament, held last June at the beautiful Sacconnesset Golf Club in Falmouth, was a HUGE success. We raised nearly \$80K for The Bulfinch Group Charitable Foundation, an all-time fundraising record. We are very proud to say that our Foundation continues to make a difference in the communities we serve. Save the date for this year's golf tournament and clinic!

**Save the date: Monday, June 17<sup>th</sup>, 2024**

16<sup>th</sup> Annual

## Golf Outing

THE BULFINCH GROUP  
*Charitable Foundation*

### 2024 Charitable Golf Tournament

Save the date for the 16th Annual Charity Golf Tournament to be held on Monday, June 17th, 2024 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: [birdease.com/bulfinchgolftournament](http://birdease.com/bulfinchgolftournament)

### Chili Cook-Off FUN Raiser for the Foundation

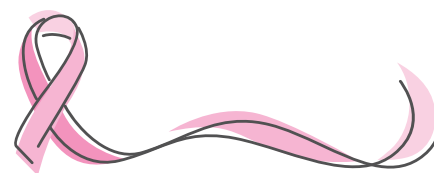


This year's chili cook-off "Fun Raiser" for our Foundation did not disappoint! We had a flaming hot time at the MIT Endicott House in Dedham—the evening saw a healthy chili making competition while raising funds for The Bulfinch Group Charitable Foundation. Congratulations to our winners, TEAM RED HOT CHILI PEPPERS - Will Herbert, Peter Klay, Eric Porter and Doug Reiss.



### Breast Cancer Awareness Month – Pink Day!

Bulfinchers, both survivors and supporters, were tickled pink to show their support on October 24th for Breast Cancer Awareness month.





## Give Back Continued...

### Warm Up Drive and Food Drive

Bulfinchers helped to spread holiday cheer this season by participating in our annual Warm Up Blanket drive. Our warmup drive benefits **Welcome Home**, a nonprofit organization based in Natick. Welcome Home strives to provide families experiencing hardship with basic household items they need to live with dignity – the organization collects and redistributes like-new household items to hundreds of people in need each month with no fees, no forms and no requirements.

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 which rely on the Food Pantry each week.



## Have Fun

### Friendsgiving



Nearly 50 Bulfinchers gathered for a Friendsgiving lunch, catered by **Bakers' Best Catering**, and enjoyed each other's company. There was much laughter and camaraderie as we made time to gather together during the busy holiday season.

### Spartan Challenge – Fenway Park

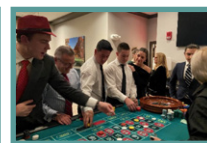


Spartan strong! 24 Bulfinch Spartans gathered at Fenway Park on a brisk Saturday in November, to challenge themselves for the Bulfinch Second Annual Spartan 5K 20+ obstacle course. This athletic challenge was no easy feat, but extremely rewarding for all participants, as you can clearly see by the smiles and true grit.

### 2023 Bulfinch Holiday Party



Happy 30th anniversary to us! Nearly 150 Bulfinchers and guests celebrated the firm's incredible growth and history – an astonishing 30-year achievement! To help create a fun and exciting celebratory atmosphere, invitations suggested a speakeasy/roaring 1920s Great Gatsby theme of glitz and glamour complete with a speakeasy lounge casino with blackjack and roulette tables. A shout out to @charlesrivercountryclub for creating such a wonderful and magical evening.



# Associate Spotlight



**RYAN COBURN**  
*Financial Advisor*

Ryan joined The Bulfinch Group in May 2022 after spending five years in sports marketing & advertising for Spartan Race, where he developed strategic relationships. When we asked Ryan to reflect on the past two years as a Financial Advisor for The Bulfinch Group, he shared the following: "My career as a financial advisor has allowed me freedom and autonomy unlike any other

career: freedom to work with clients I enjoy, freedom to focus on and learn more about topics and industries that interest me, but most importantly, freedom to spend my time as I choose. My weeks are no longer Monday through Friday, 9:00 a.m. to 5:00 p.m., they are fluid and my own. Time spent with family/friends, time spent working within my business with clients, and time spent working on my business in learning and personal growth, all find a home in my calendar where they make the most sense for me. This has become even more valuable as my family has grown with the addition of my baby girl. Building a business is hard work but has allowed me to structure the life I want to live week by week, rather than having to wait until retirement to do the things I enjoy. At The Bulfinch Group, we truly get to build a business that is our own, and work with people we care about." - Ryan Coburn



## 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!

If you're interested in starting a conversation about a new career opportunity, contact:

**Douglas Reiss**  
Director of Talent Acquisition  
[douglasreiss@bulfinchgroup.com](mailto:douglasreiss@bulfinchgroup.com)  
(617) 921-6827

The Bulfinch Group is an Agency of The Guardian Life Insurance Company of America® (Guardian), New York, NY. Securities products and advisory services offered through Park Avenue Securities LLC (PAS), member FINRA, SIPC. OSJ: 160 Gould Street Suite 310, Needham, MA 02494, 781-449-4402. PAS is a wholly-owned subsidiary of Guardian. This firm is not an affiliate or subsidiary of PAS. Life insurance offered through The Bulfinch Group Insurance Agency, LLC, an affiliate of The Bulfinch Group, LLC. The Bulfinch Group, LLC is not licensed to sell insurance. Guardian and its subsidiaries do not endorse or have any direct or indirect responsibility with respect to the activities of The Bulfinch Group Charitable Foundation. 2024-169422 Exp 3/26