

Opening Remarks

*As we embark on 2018, we look back on the many achievements of 2017 with an eye on always being **The Best at Getting Better**. The Bulfinch Group has thoughtfully created a new Mission Statement to guide us forward, with an ongoing emphasis on the well-being of our clients, the associates in our firm, our families and our neighbors. We hope you enjoy this issue of *The Insider* which will give you a small glimpse at the many initiatives we are doing at the firm, all taking our motto **Be Professional, Give Back, and Have Fun**, to new levels. Happy New Year!*



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

Congratulations to our Five Star 2018 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 February 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.

The Bulfinch Group 2018 designees:

Back row: Seven-year winner Kevin Schneider, CLU®; Four-year winner Ari Stonehill; Seven-year winner Gary Peters, CLU®, ChFC®; 2018 winner Derek Mazzarella; Five-year winner John Balzer, J.D., CLTC; Seven-year winner Gracio Garcia, AIF®

Front row: Three-year Five Star Investment Professional award winners Lee Adelson, LUTCF®, CLTC, and Yan J. Katz; Five-year Five Star Investment Professional award winner Peter Magni, LUTCF®; Six-year winner Zvi Shtifter, CLTC, RICP®; Five-year winner Barry Zimmerman; Six-year winner Amy Lampert; Seven-year winner Richard Belofsky, CLU®, ChFC®, CFP®

Our Mission Statement



At the beginning of 2017, The Bulfinch Group embarked on a journey to re-envision our existing mission statement. We engaged in a collaborative process involving many members of the firm. We crafted a new statement which proudly communicates our

core values and desire to have an impact. Our new statement is now proudly displayed in our lobby as an on-going reminder of what we, together, value most: our people, our clients and the community in which we serve. Please check out our new mission statement on www.bulfinchgroup.com.

Associate *Spotlight*



**Andrew
Guyton**

"Having grown up surrounded by this business, I had the privilege of speaking with my father's clients and hearing some of their stories. When I started my first job out of college, I noticed that the planning people were doing was not consistent with what I had come to know. Even my own planning was drastically different than my peers. I entered this business to show as many people as possible that there is a better way to plan, and that through understanding different planning vehicles and creating a cohesive strategy, you can re-take control of your financial future."

Give Back



A sincere thanks to those Bulfinchers who donated new/gently used warm clothing to our first "warm up drive," benefitting Needham-based [Circle of Hope, Inc.](#) Circle of Hope provides clothing, toiletries, and necessities to 21 homeless shelters and clinics in Boston and MetroWest. All of the items donated were reallocated to shelters within one week of receiving the items. Collectively, we made a difference!



Numerous Bulfinchers recently participated in a Heartsaver training, learning essential skills related to CPR, the Heimlich maneuver and first aid. This life saving session was facilitated by the [Beth Israel Deaconess Hospital - Needham](#) nurses. CPR saves lives, and all participants feel confident that their newly-acquired CPR skills can be used any day to help save a life.

Have Fun

Bulfinchers Kevin Schneider, Jeb Brady, Peter Klay and Douglas Reiss enjoyed watching the New England Patriots take on the Atlanta Falcons for a Super Bowl rematch on a foggy night in Foxboro.



ELVIS SIGHTING!

Bulfinchers Maureen Ryan, Steve Misdea and Doug Swartz pose with Elvis during the October Advanced Disability Meeting (ADM) awards conference in Nashville, TN. In addition, musician, rapper, songwriter, actor and record executive Ice-T hangs out with our own Dimitry Neyshtadt!



Save the Date

The Bulfinch Group Charitable Foundation's 11th Annual Golf Tournament



We have started planning for our 11th annual charity golf tournament – taking place on Tuesday June 12th at the beautiful TBC at Sacconnesset in Falmouth.

Last year, our 10th annual tournament was an amazing success and helped us raise a record-breaking \$74,000 in net charitable proceeds that were used to support vital nonprofit organizations throughout the communities we serve. We were pleased to be able to commit a grant of \$40,000 to Riverside Community Care's Trauma Center, as well as fund 19 additional grants for Bulfinchers to give to their favorite charities.

Holiday Festivities

Our annual holiday party, held at Charles River Country Club in December, was a perfect way to spread cheer and enjoy each other's company.



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