

## Opening Remarks

*We are pleased to present this issue of **The Insider**, which shines a light on a number of ways we Bulfinchers **Do Well, by Doing Good – Giving Back, While Having Fun**. We are especially excited about our summer 10<sup>th</sup> Annual Charitable Golf tournament that saw over 100 golfers participating in a day of great golf and camaraderie while helping to raise record charitable donation proceeds (see below for more detail). We hope you enjoy this issue of **The Insider** and reflect on how giving back cannot only be rewarding, it can be fun too!*



From Left to Right: Thomas Harmon, CLU<sup>®</sup>, ChFC<sup>®</sup>, Senior Vice President, Partner • Seth Medalie, CLU<sup>®</sup>, ChFC<sup>®</sup>, President; and Kevin Schneider, CLU<sup>®</sup>, Executive Vice President, Partner

## Be Professional



American Prime. We enjoy being the main sponsor for this fun summer event.

Although the temperature was scorching, that did not put a damper on the conversations held by Newton-Needham Chamber members at the annual Summer Social, held at Hotel Indigo Boston - Newton Riverside and Bokx 109

## Congratulations to our 2017 Leaders Club Qualifiers



this year's winners: Richard Belofsky, Matthew Berard, John Brady, Michael Elcock, Gracio Garcia, Andrew Guyton, Joseph Guyton, Richard Howell, Gary Joyal, Thomas Harmon, Yan Katz, Boris Lokshin, Martin Lowenthal, Mark Markell, Brian McGrath, Leigh McCloskey, Dimitry Neyshtadt, Gary Peters, Maureen Ryan, Kevin Schneider, Melissa Simeone, Zvi Shtifter and Barry Zimmerman.

Congratulations to this year's Leaders Club producers - one of the highest designations annually awarded by Guardian<sup>®</sup> to advisors who demonstrate outstanding service dedication to their clients. Kudos to



The awards banquet was held in Scottsdale Arizona in May, and all of our award winners enjoyed some "down-time" with their families.

## Associate

# Spotlight

### Leigh McCloskey

Director of Client Relations;  
NAIFA-MA's 4 Under 40 Award.



*Congratulations to Leigh McCloskey, Director of Client Relations, who was awarded the "4 under 40" industry award by the National Association of Insurance and Financial Advisors of Massachusetts (NAIFA MA). When Leigh joined the firm in 2013, he started to build his practice and his attention to detail and strong analytical skills caught the attention of advisors within the firm. Leigh initially worked with several advisors, learning the business from them. By creating strong partnerships with financial advisors, the team maximizes client engagement throughout the financial planning process, leaving clients feeling empowered and confident in their decision-making. Leigh we are proud to have you as the fourth Bulfincher to receive this prestigious designation.*

Previous 4 Under 40 Award Recipients:

2016 - Brian McGrath;  
2015 - Yan Katz; and  
2014 - Dimitry Neyshtadt.



# Give Back

## Golf tournament – June 21st



Cheers to "fun in the sun" at The Bulfinch Group Charitable Foundation's 10th Annual Charity Golf Tournament, held at the beautiful TGC at Sacconneset in Falmouth. The tournament was an amazing success and helped us raise a record-breaking \$74,000 in net charitable proceeds that will be 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 create funding for additional grants to be made through The Bulfinch Group Charitable Foundation. The Foundation provides an opportunity for Bulfinchers to request grant support for their favorite charitable causes in the communities in which we serve. If you have not seen our video, check it out (and share it too):

[www.facebook.com/pg/BulfinchGroup/videos](http://www.facebook.com/pg/BulfinchGroup/videos)



For more pictures from the event, check out our Facebook page. And save the date for our 11<sup>th</sup> annual charity golf tournament, scheduled for Tuesday June 19, 2018.

## Have Fun



On July 29<sup>th</sup>, nearly 70 people attended The Bulfinch Group's Tips for Success event at the Harpoon Brewery in Boston to hear Mike Reiss from ESPN speak to the characteristics that continue to keep **New England Patriots** at the top of their game! The atmosphere was conducive to great conversation and everyone enjoyed tasting Harpoon's latest beer samples.

## Junior Achievers – June 15

Six Bulfinchers volunteered their day to Junior Achievement of Boston, teaching 1st graders fiscal responsibility. Both the volunteers and the children had a great day of learning, interaction and laughter.

Volunteers were (left to right): Maureen Ryan, Gina Christiano, Caroline Christiano, Galina Pekurovskaya and Margaret Simonds; not photographed, Terry Stramowski.



## Save the Date

### Join us!

Our upcoming Scavenger Hunt fundraiser will take place on Friday September 22<sup>nd</sup> on the streets of historic Needham center – a true "fun" raiser for The Bulfinch Group Charitable Foundation. So lace up your sneakers and join us at 4:30pm for some fun, and then hang your sneakers for some cocktails & appetizers at The Medalie's home in Needham. Contact Gina Christiano at [ginachristiano@bulfinchgroup.com](mailto:ginachristiano@bulfinchgroup.com) to register.



\$25 per person – Sign up individually or create your own team of 4.

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