

Opening Remarks

Welcome to the Fall 2018 edition of *The Insider*, our newsletter which brings to life The Bulfinch Group's mantra *Be Professional, Give Back, Have Fun*. At Bulfinch, we are passionate about what we do, we enjoy being with each other, and we are committed to being a part of this thriving community. *Enjoy.*



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

Leaders Club 2018



Congratulations to this year's Leaders Club qualifiers. Leaders Club is one of the highest designations annually awarded by Guardian to advisors who demonstrate outstanding service and dedication to their clients. Kudos to this year's winners: Matthew Berard, John Brady, Michael Elcock, Bob Furlong, Gracio Garcia,

Andrew Guyton, Joseph Guyton, Thomas Harmon, Yan Katz, Boris Lokshin, Martin Lowenthal, Mark Markell, Brian McGrath, Seth Medalie, Dimitry Neyshtadt, Gary Peters, Kevin Schneider, Zvi Shtifter and Barry Zimmerman.

The awards conference was held in Washington, D.C. and all of our award recipients enjoyed time visiting our nation's capital.

Pictured above: Yan Katz (left) and Martin Lowenthal (right) enjoying the sites of Washington D.C.

Summer Social

We were thrilled to have been the Corporate Sponsor for the annual sold-out Newton-Needham Summer Social, held at Hotel Indigo. The poolside evening was filled with lively conversation and networking.



Our Flawless Future: *the process of crafting a perfect vision of our future*



Bulfinchers participated in an off-site planning session focused on crafting a flawless vision for the firm's future featuring the leadership of Kelli McCauley, President of McCauley and Company.

Bulfinchers later gathered at Gillette Stadium for a tour of the New England Patriots' Hall of Fame to experience the culture of the championship dynasty. Not only did we leave feeling honored to be fans, but we were also inspired about teamwork, accountability, perseverance, success and enthusiasm. **GO PATS!**

New Website!

We're excited to announce that our new website is live – www.bulfinchgroup.com. The updated site provides a glimpse into our culture featuring recent events, the impact that our charitable foundation is making in the community, and information on a career at Bulfinch. Visit to learn more about The Bulfinch Group and our redefined definition of wealth management.



Having Fun

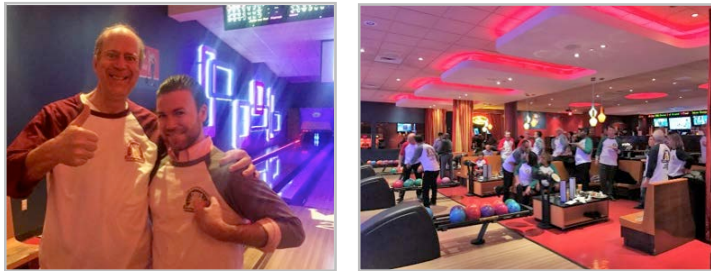
Administrative Appreciation

In celebration of Administrative Appreciation Day, our staff enjoyed a farm-to-table cooking class at The Farmhouse, in the heart of Needham Center.



Bowling Bash

Our annual bowling bash did not disappoint! Over 70 Bulfinchers came out on a Thursday night for some healthy competition, a test of skills and a great display of camaraderie.



Breakfast at Fenway

Bulfinchers enjoyed starting their day, feeling inspired by the words of Hall of Fame pitcher and Red Sox alumni, Dennis Eckersley, as he kicked off the Newton-Needham Chamber's annual Breakfast at Fenway. As a grand slam sponsor, we enjoyed Fenway Park and all its glory.



Associate

Spotlight



Andrew Guyton

Financial Advisor, Principal;
NAIFA-MA's 4 Under 40 Award.

Congratulations to Andrew Guyton, Financial Advisor and Principal, The Guyton Group, who was awarded the "4 under 40" industry award by the National Association of Insurance and Financial Advisors of Massachusetts (NAIFA MA). Andrew's passion is showing current and prospective clients new and more efficient ways to implement their planning. Andrew, we are proud to have you as the fifth Bulfincher to receive this prestigious designation.

Previous 4 Under 40 Award Recipients:



2017 - Leigh McCloskey



2016 - Brian McGrath



2015 - Yan Katz



2014 - Dimitry Neyshtadt

Give Back



The Bulfinch Group Charitable Foundation's 11th Annual Charity Golf Tournament was held at the beautiful TGC at Sacconneset in Falmouth and

raised \$70,000 in proceeds. Funds from the tournament will be provided to Riverside Community Care's Trauma Center, the BID-Needham's new Outpatient Clinical Center, and other nonprofits recommended for grant support by our Bulfinch associates and their families.



Save the date for our
12th Annual Charity Golf Tournament,
scheduled for Tuesday June 11, 2019.

You're Invited

You're invited to The Bulfinch Group Fall Open House - **Thursday, October 11th** from **5:30 p.m. - 7:30 p.m.** at our headquarters at **160 Gould Street, Suite 310, Needham.**

Join us for refreshments, camaraderie and games as we open our offices for some healthy competition; including corn hole, giant size jenga and "chippo" golf.



RSVP to ginachristiano@bulfinchgroup.com by October 5, 2018. Bring a friend and learn more about The Bulfinch Group!

We're Hiring!

Do you, or anyone you know, want to join a world-class organization, with a mission to serve our communities with respect, passion and integrity? Visit our [Careers Page](#) for more information on all available positions, including a [Talent Acquisition Specialist](#) role, [Financial Representative Protege](#) and more. Please do not hesitate to reach out to us with any questions!



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