

News and Insights: 9/24/2021

Green Wealth Management Group on the move:

The team at Green Wealth Management Group hopes you had a healthy and happy summer season. With autumn upon us, we are pleased to share the following updates:

Soon we will be in our permanent office location at 555 Heritage Rd #2W, Southbury, CT. We are painting walls, installing new flooring, and generally upgrading the space. The team is hopeful to move in during the first week of November. We look forward to welcoming you there as soon as you are comfortable visiting.

In other news, we recently hired Francis Gallo as a Registered Client Associate. Fran graduated from Fairfield University with a bachelor's degree in Finance and began his financial services career in New York City, at an investment firm specializing in high-yield fixed income. He specialized in various operations and project management roles while there. Most recently, Fran worked at People's United Advisors as a Registered Representative. In total, Fran has over 15 years' experience working with institutional and individual investment clients. Born and raised in Connecticut, he lives in Shelton with his wife Eman and two children, Aalia and Zaid. We are very excited about the complementary skill set that Fran brings to Green Wealth Management Group.

We want to take this opportunity to thank you for business and the trust you place in us. We look forward to our next interaction with you and wish you good health.

Alan, Lori, and Drew