GREENHOUSE
WEALTH
MANAGEMENT

GROWTH IS ALWAYS IN SEASON.

MISSION STATEMENT

To be our client's most trusted financial partner, always acting in their best interest to achieve, and surpass, their personal and financial goals.

WHY GREENHOUSE?

ONE AGENDA

you.

ONE BAR

the highest.

ONE GOAL

the protected growth of your wealth.

TO ENSURE THAT...

- We have absolutely no conflicts of interest or hidden agendas.
- We help you develop a customized financial plan that will simplify your life so you can focus on what matters most.
- We "grow responsibly", using low-cost investment solutions so you keep more of what you make.
- We genuinely care - about your family, their wellbeing, and their financial independence.

WHO WE ARE

Greenhouse Wealth Management, LLC is an independent Registered Investment Adviser operating in the State of Connecticut. Founded in 2016 by Ryan W. Callas, CFP®, Greenhouse delivers highly customized and effective wealth management and financial planning strategies to individuals, families, and businesses.

Established with the conviction that clients long for a *trusted fiduciary* to grow wealth simply, steadily, and comprehensively, Greenhouse merges expertise and success in goals-based investing, portfolio management, insurance, tax-efficient investing, wealth transition planning, income strategies, budgeting, and risk management.

Greenhouse Wealth Management, LLC has partnered with Charles Schwab & Co., Inc. as its primary custodian for client assets. This partnership provides clients with the safety and security of one of the largest, most trusted financial institutions while benefiting from the highly personalized “family office” approach

Greenhouse is proud to offer. The delivery of client statements, tax forms, web access, mobile banking, 24/7 customer service, and SIPC Insurance will all be administered by the custodian.

ABOUT US

RYAN W. CALLAS, CFP®

At the foundation of Greenhouse Wealth Management is this belief: putting the customer's interest at the center of every decision. Always.

That conviction was essential in empowering Ryan to achieve financial security for hundreds of clients, most recently as a Vice President at Fidelity Investments, where he was responsible for financial planning and portfolio management of 450 high net-worth families and businesses, representing more than $900 million in assets.

The seeds of that success, and that of Greenhouse, go back many years, and help to explain the company’s name. Inspired by

Victoria Callas, Ryan's mother – an avid gardener, Greenhouse takes its name to honor a woman who not only nurtured growth in the garden, but who nurtured those around her with warmth, kindness, and genuine concern.

Victoria's passion for helping others in meaningful ways was instilled in Ryan. Today, he and Greenhouse have the tremendous honor of serving clients in a significant and deeply impactful role – ensuring their financial security for this generation and beyond.

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BUSINESS BELIEFS

- **WE BELIEVE** more money is lost overlooking important details than gained choosing spectacular investments.
- **WE BELIEVE** every client deserves an independent financial advisor, bound by a fiduciary oath to put their interests first.

- **WE BELIEVE** costs matter, so low-cost index investments are core holdings.
- **WE BELIEVE** in the courage to say “I’m not sure of the answer, but I know how to find it."
- **WE BELIEVE** you should enjoy wealth throughout your lifetime.
- **WE BELIEVE** in scrupulous tax planning, to maximize portfolio performance.

PLANNING CAPABILITIES

IF YOU HAVE FINANCIAL GOALS AND LOVED ONES YOU CARE ABOUT, YOU NEED A PLAN.

HERE ARE SOME OF THE AREAS WHERE GREENHOUSE CAN HELP:

INVESTMENT MANAGEMENT

- Asset Allocation
- Risk Management
- Rebalancing
- Tax-Efficient Investing
- Tactical Strategies

RETIREMENT PLANNING

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- Income Strategies
- Social Security
- Longevity Planning
- Tax-Sensitive Withdrawal Strategies
- 401(k), 403(b), IRA's & Annuities

WEALTH TRANSITION PLANNING

- Trusts & Estate
- Life & Health Insurance
- Divorce & Legal Separations
- Education & Custodial Accounts
- Charitable Giving

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Disclosure (/disclosure) | Privacy (/privacy)