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Local Insight and Experience, National Resources and Support

We are a Maine-based financial planning and investment strategy firm serving New England and beyond.

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Welcome to Evergreen Strategic Partners

At Evergreen Strategic Partners, we bring more than 30 years of experience with financial planning, insurance services, and investment strategies to clients searching for their path to financial freedom and the retirement they deserve.

Evergreen Strategic Partners focuses on building long-term relationships with clients who expect superior, individualized service. We believe the plans we create with clients not only address their goals and aspirations, but also reflect the deep understanding, mutual respect, and friendship we share with them.

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Our Team

Evergreen's dedicated professionals are focused on superior client service.

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Our Process

We create financial plans tailored to your goals, aspirations and dreams.

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Our Partners

Evergreen is backed by the history and resources of Northeast Planning Associates and LPL Financial.

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