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Green Wealth Management is your local branch office of LPL Financial (http://LPLfinancial.LPL.com), the nation's number one independent broker/dealer.* The Green Wealth Management team serves our clients in the Sacramento and foothill communities--as well as clients in over a dozen states.

We can help you define your long-term investment objectives and build a personalized investment portfolio designed to address them. We recognize the importance of getting to know you, your financial needs, your financial goals and your lifestyle, so please contact us for a personal meeting.

By focusing on fee-based investment management for our clients, we are able to offer truly objective financial advice to our clients. This method of compensation allows us, as your financial advisors, to adjust your investment portfolio without requiring you to pay commissions.** Working on a fee basis allows us to:

- Customize an investment portfolio that is designed to help you pursue your short- and long-term investment goals.
- Provide simplified performance reporting, making it easy for you to monitor your account.
- Support you with ongoing professional advice, timely information about your account and updates on the world's financial markets.
- Manage your portfolio and make investment changes without commissions** as your objectives or the economic climate changes.

The wealth advisors at Green Wealth Management want to guide you in your financial planning to pursue your financial goals with confidence. As financial advisors for our clients, many of whom have been clients for decades, we want them to have confidence knowing that a financial advisor is servicing and overseeing their accounts, whatever the market-cycle or their life-stage.

* As reported in Financial Planning magazine, June 1996-2018, based on total revenue.

** Nominal transaction charges may apply.
