



Providing trusted advice for individuals and families since 1968.

FREEDMAN FINANCIAL

planners • advisors • partners



Supporting Your Dreams

From our office in the heart of the North Shore, Freedman Financial symbolizes the values and traditions of the New England area. Our goal is to help build a secure future for you and your family by providing guidance throughout life's important events. Whether you are accumulating wealth, planning for retirement, seeking to replace your paycheck or protecting your family's assets, we have the resources to develop strategies to meet your unique circumstances.

Our experienced team takes time to understand your goals and dreams and creates a thorough financial plan that aligns with your needs. Once your plan is in place, you can count on us to be the guardians of your wealth as we monitor and track your finances. By practicing honesty and mutual trust, and always placing your interests first, we strive to build a lifelong relationship with you.



Financial Planning Done Right

Through unbiased advice and unparalleled personal service, we have been developing comprehensive financial planning strategies for individuals and families since 1968.

Our philosophy is that financial planning needs to include conversations around your feelings about money, as much as it needs to include the hard facts about money. Providing for your loved ones, protecting your income and preserving your legacy are all critical elements that need to be woven into the planning conversation.

As an independent firm, we have access to state of the art technology and unbiased industry research. We are free to provide you with comprehensive planning, unbiased solutions and personalized service. Your best interests are always our top priority.

We have been recognized nationally as a leader in practice management, client services and financial planning strategies because of our commitment to innovation and a strict code of ethics.





“Guiding you to make confident, informed decisions and helping you pursue financial success are responsibilities we take very seriously. We are committed to ensure that every aspect of your financial future is addressed so you can concentrate on doing the things in life you enjoy most.”

– Marc S. Freedman, CFP®, President

A Consistent Approach

We don't believe that it is possible to place your interests first without initially capturing an accurate snapshot of your financial well-being and developing a clear understanding of your goals and objectives. Only then can we work together to create a financial plan that addresses your unique needs by encompassing some or all of the following services:

- Comprehensive financial planning
- Fee-based wealth management
- Tax strategies
- Retirement income management
- 401(k) rollovers
- Long-term care insurance
- Major purchase decisions
- Estate planning
- Capital preservation

We're ready to serve you. If you or someone you know would benefit from our comprehensive approach to managing your financial future, we invite you to learn more at www.freedmanfinancial.com.



Marc S. Freedman, CFP®, President



Second generation financial planner Marc Freedman has nearly two decades of experience in the financial industry. He is committed to helping clients gain control of every aspect of their financial lives by putting their interests first and providing comprehensive financial planning advice.

He is the author of *Oversold and Underserved—A Financial Planner's Guide to Serving the Mass Affluent*, which has been recognized by the industry as a blueprint for building better relationships between financial planners and their clients. He is also a sought-after speaker who has addressed international audiences in Singapore, Germany, Austria and the Netherlands, as well as a frequent expert source for national media outlets such as the *L.A. Times*, *The Wall Street Journal*, *Reader's Digest*, *Money Magazine*, *Business Week*, *USA Today*, *The Journal for Financial Planning* and *Financial Planning* magazine. Yet with all of this national attention, his focus is on the New England region, where he is passionate about giving back to the local community and educating the public on financial topics.

Marc holds Series 7, 24, 63 and 65 securities registrations with LPL Financial, in addition to being a CERTIFIED FINANCIAL PLANNER™ practitioner. Marc received a BS in Business Administration from Babson College.



Marion B. Gilman, CFP®, Executive Vice President



Since joining Freedman Financial in June 2000, Marion Gilman has built lasting relationships with several generations of clients. She embodies the firm's client-centric approach—meeting regularly with them, crafting financial plans that focus on their needs and building sound investment portfolios aligned with their goals.

Prior to joining Freedman Financial, Marion was an Assistant Professor at Johnson & Wales University Graduate School and Adjunct Professor of Finance at Bentley College. She has served on the Board of Directors of the Peabody Chamber of Commerce, along with being Treasurer for two years. In addition, she has been a guest reader in the Peabody Schools and an active volunteer in the Middleton Schools.

Marion holds Series 7, 24, 63 and 65 securities registrations with LPL Financial, in addition to being a CERTIFIED FINANCIAL PLANNER™ practitioner. Marion received a BA from Connecticut College, an MBA from Bentley College and an MA in Economics from the University of New Hampshire.

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INDEPENDENCE POWERED BY LPL FINANCIAL

Freedman Financial is powered by LPL Financial, the nation's largest independent broker/dealer.* LPL Financial has no proprietary products and provides us with a comprehensive array of tools, resources and technology. This enables us to provide you with objective financial guidance.

* As reported by *Financial Planning* magazine, June 1996–2010, based on total revenue.