Financial Advisors

FREEDMAN FINANCIAL
planners · advisors · partners

Freedman Financial

Providing Trusted Advice for Individuals and Families Since 1968.

Do you find it difficult keeping up with the pace of change in today's world?

Well, it's especially true in the world of financial planning. Finding an objective, independent advocate who places your interests first isn't easy. Perhaps Freedman Financial is the solution for you.

For more than 43 years we've been delivering financial planning in what we believe to be the right way. The way you'd expect it to be delivered.

When you engage in a relationship with Freedman Financial, you can be certain that we will commit to understanding your complete financial picture before offering any recommendations or pieces of advice.

Unlike the traditional "financial advisor" approach of selling you a product first and asking questions later, we rely on a time-tested planning process that has allowed us to maintain a 95% retention rate with our clients over the past 20 years.

We are a firm dedicated to working with North Shore families, and individuals who recognize that the primary step in planning STARTS with helping you get your financial house in order.

By reviewing tax returns, estate documents, investment accounts, bank statements, benefits booklets and spending habits, we can help you craft a long-term plan that aligns with YOUR UNIQUE LIFESTYLE; not a cookie-cutter model that can be solved by answering a few items on a questionnaire.

If you've ever wondered if "real financial planning" could be delivered without feeling like you had to "buy something" first, now's the time to learn how our nationally-recognized approach to independent, objective planning can deliver financial peace of mind to you and your family.

As Certified Financial Planner professionals, we are required under our code of ethics to deliver a "Client First" approach.

Since 1968, we have provided a no-fee initial consultation. This allows both you and our team the opportunity to determine whether your needs and our services are a proper fit.

We would be delighted to send you our information package at no cost to you. In addition, we'd like to send you our newly published "Retirement Resource Booklet" as an added bonus. Please call us today to find out how we can help you and your family plan for the road ahead.

Marc S. Freedman, CFP®
CERTIFIED FINANCIAL PLANNER™

Marion B. Gilman, CFP®
CERTIFIED FINANCIAL PLANNER™

Freedman Financial

8 Essex Center Drive, 3rd Floor
Peabody, MA 01960

978-531-8108
info@freedmanfinancial.com
www.freedmanfinancial.com