

Our Core Values

Be professional, give back, have fun – these are core values of The Bulfinch Group. The Insider tells a bit of the story in regard to how we incorporate these mantras into our professional and personal lives. We hope you enjoy this issue and learn a bit more about our firm and our values.



From Left to Right: Thomas Harmon, CLU®, CHFC®, Senior Vice President, Partner • Seth Medalie, CLU®, ChFC®, President
Kevin Schneider, CLU®, Executive Vice President, Partner

Be Professional

Congratulations to Bulfincher and Managing Director Jeb Brady, winner of the prestigious Brian H. Early Frontline Excellence Award



This industry award is given by GAMA to the top Managing Director of every major life insurance company worldwide.

From Left to Right: Doug Reiss • Jeb Brady • Kevin Schneider • Seth Medalie

Hotel Indigo Poolside...

As a sponsor of the Newton-Needham Chamber of Commerce's annual Hotel Indigo pool deck party, we joined our fellow Needham/Newton businesses and business owners poolside on June 20th



to network and enjoy a warm summer night. Bulfinchers Kevin Schneider and Douglas Reiss can be seen mingling with the crowd.



We're Expanding!

Our firm is looking to add to our team: we are seeking individuals who share our similar principles, who have the



desire to succeed, and who strive to make a difference in their communities. Currently, we have open positions for financial professionals, a Talent Acquisition Specialist, a Senior

Benefits Analyst and administrative positions. If you know a professional who would benefit from a conversation about any of these roles and our firm, please have them reach out to Doug Reiss, Director of Talent Acquisition by email douglasreiss@bulfinchgroup.com or phone 781-292-3257.

Associate *Spotlight*



As a Financial Representative, it is an honor and a privilege to wake up each day and head to work - knowing that each client interaction can positively impact families for not only this year and next, but also for generations into the future. It is the ability to have such an immense impact in our client's lives that really motivates me to continue to put in the work each and every day. We have the best job in the world!

**Dimitry
Neydshadt**



THE BULFINCH GROUP
Charitable Foundation

Give Back

The Bulfinch Group Charitable Foundation

On June 13th, The Bulfinch Group Charitable Foundation held our 9th Annual charity golf tournament at The Golf Club in Falmouth, MA. Nearly 100 golfers filled the course and had a fabulous day of golf, sunshine and camaraderie.



The successful fundraiser again allowed us to **earmark \$40,000 to Riverside Community Care's Trauma Center**, as well as raise funds for additional grants to other nonprofits. This is the Foundation's third grant at this significant level for Riverside. **Save the date for the 10th annual tournament on Wednesday, June 21, 2017!**

Junior Achievers for a Day



On June 7th, seven Bulfinchers volunteered their day to Junior Achievement of Boston, teaching 2nd graders fiscal responsibility. Both the volunteers and the children had a great day of learning, interaction and

laughter. Volunteers were: Leslie Medalie, Gina Christiano, Terry Stramowski, Sean Spencer, Dimitry Neystadt, Peter Klay and Maureen Ryan.

Have Fun

Playing is important!

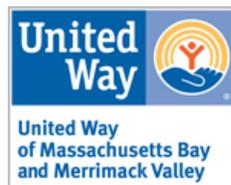
Mid-June, Million Dollar Round Table (MDRT) and the MDRT Foundation held its annual meeting in Vancouver, British Columbia. As a service project to leave a lasting memory, the MDRT Foundation partnered with



KaBOOM! to build a playground. Bulfinchers Dimitry Neyshtadt (fourth in from left) and Peter Magni (second in from right), both MDRT members, assisted in the playground build along with other Guardian representatives. Dimitry and Peter, you make us proud in your effort to ensure that "play" actually matters!

The United Way

The United Way of Massachusetts Bay and Merrimack Valley was recently granted a gift of \$47,250 from Guardian Life during a one-time corporate giving challenge. In 2015 Guardian Life challenged all of its firms across the U.S. to donate to charities of their choice and be eligible to receive a match of up to \$500,000 for their local United Way. The Bulfinch Group met the challenge with a 2015 charitable total of over \$47,250 donated to non-profit



organizations throughout New England through The Bulfinch Group Charitable Foundation. This significant amount of giving earned The Bulfinch Group a grant made in their name to The United Way of Massachusetts Bay and

Merrimack Valley. The grant made on behalf of The Bulfinch Group will help provide enriching early childhood and out-of-school time programming as well as innovative ways for families to get the financial education and the support they need to build a better life.

Save the Date

The Bulfinch Group Charitable Foundation's Needham Scavenger Hunt!

Join us Friday, September 23rd, at 4:00pm around Needham Center. A great way to have fun and raise funds for the foundation.

\$25 per person – Sign up individually or create your own team of 4.

Conclude the hunt with cocktails & appetizers at The Medalie's home in Needham.

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