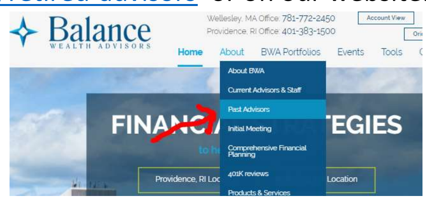
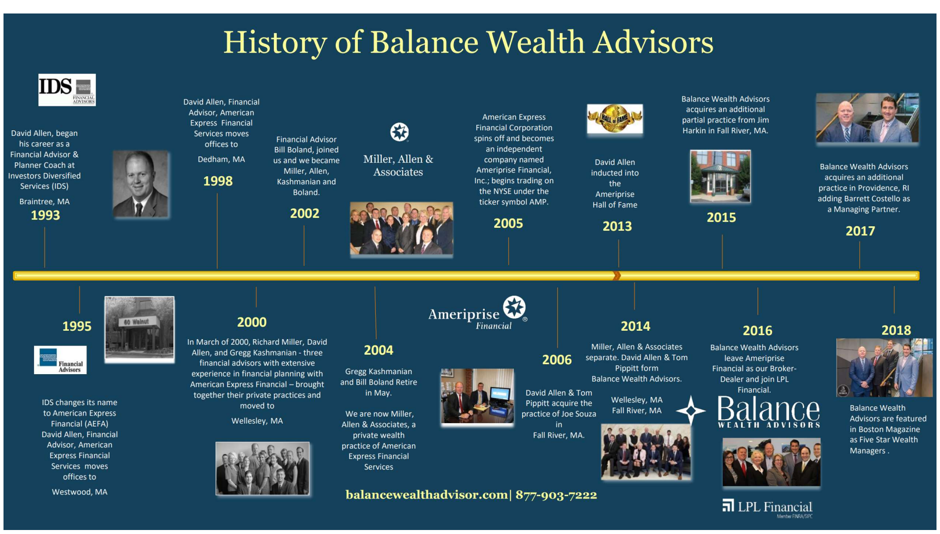
balancewealthadvisor.com
Wellesley, MA - Providence, RI | 877-903-7222

We are all looking forward to Spring. A quick note and some history of Balance Wealth Advisors. All of this information is readily available on our website. I knew there was a reason I built out these pages over the last 3 years. Originally it was so I would remember the people who helped me become successful.

Here is the link to review Past & Retired advisor's biographies:
https://www.balancewealthadvisor.com/retired-advisors or on our website:



I started at IDS Financial Services (*now Ameriprise) in 1993 and worked there for 24+ years. During this time, I purchased multiple practices from retiring advisors. The first practice that I bought with a partner, Richard Miller, was the practice of Gregg Kashmanian in 2000. This is what predicated moving both of our practices to Wellesley, MA into the same offices that we are in today. The second practice that we (David and Rick) purchased was a friend of Gregg Kashmanian's, we purchased the practice of Bill Boland in 2002. Greg will be 84 this year and he and his wife live full time in Naples, Florida. Bill will be 85 this year and he and his wife split time between MA and Florida. Rick continues to work with the 50% of both practices and has moved his office directly above us here in Wellesley based on us running out of space. We are still friends. I continue to work with 50% of the clients from both practices. The next practice I purchased was in 2006. It was the practice of Joe Souza and I did this with a friend from college, Tom Pippitt. Tom continues to run the Fall River practice and we are still friends. Joe will be 78 years old this year. Unfortunately, Joe is in a supervised home and his wife Fran moved to South Easton to be closer to her husband and her grandkids. The next practice we (Tom and David) purchased was a partial practice from Jim Harkin. Tom and I purchased the RI and Massachusetts clients (mostly family and friends) of an Advisor whose business was in Arizona but he was from South Eastern Massachusetts (Fall River). Tom and I continue to be very close friends.



Next comes the practice of Bob Veasey. I purchased this practice in 2017 based on an introduction from Stratos Wealth Partners. I departed from Ameriprise and joined Stratos Wealth Partners/LPL Financial in November 2016 for many reasons which I can go into in person. Independence and the ability to do things in the best interest of clients were high on the list. We continue to improve all of our technology and processes. Our move to LPL in November 2016 was the best decision we have made. I wish that I had done this move 5-10 years earlier. We would have been even better financial advisors sooner. There are lots of things that we did not know in our old world.

I would like to chat with you over the phone or in person. You are welcome to line something up with Amy O'Connell, Operations Manager at 781-772-2470 or 401-383-1500. amy@balancewealthadvisor.com

I would also be more than happy to line up conversations with Gregg, Bill, Fran, Jim or any other people whom I have purchased practices from in the last 20+ years if you need more insight on the person that I am. I can also arrange conversations with Rick Miller and/or Tom Pippitt my 2 business partners over the last 20 years. Character and Integrity are very important to me. When you do the right things for clients in the right way, you have nothing to lose and nothing to fear.

We will continue to operate BWA Providence in the same office – 559 S. Water Street. I will be meeting with all clients and referrals. Our job is to listen to you, advise you on you accounts and get things done for you. I was there last Wednesday 3/4/2020 for 6 appointments (*pictures below). I love what I do, always have.

We are looking forward to the rest of 2020 please check out the events for the remainder of the year on our webpage. I am looking forward to all of them especially our sailing excursion in Newport on Friday, July 31st or our get together at The Boathouse in Tiverton on Friday, August 28th

Sincerely,

David Allen – CRPC, CLTC
Owner of Balance Wealth Advisors and Independent Financial Advisor