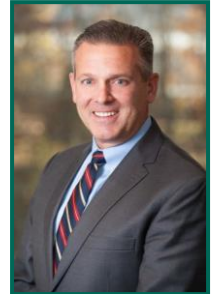


Our Core Values

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: Seth Medalie, CLU[®], ChFC[®], President • Kevin Schneider, CLU[®], Executive Vice President, Partner
Thomas Harmon, CLU[®], ChFC[®], Senior Vice President, Partner

Be Professional

The Firm Expands

The Bulfinch Group is pleased to announce that the merging of Wellesley Financial Group into our firm has been a tremendous success. Thank you to everyone involved; and a special THANK YOU to the dynamic duo of Donald Gilmore and Fawn Sherman



for their tremendous efforts in managing the logistics of the transition. We are excited for a successful 2016 and beyond.

The Growth Doesn't Stop With The Merger

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. We are currently looking 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.

Creating a Culture for Success and Development

Our firm wrapped up 2015 by hosting a motivational Newton Needham Chamber of Commerce event: **Today's New Workplace – How to create a culture for success and**



associate growth. Today's New Workplace was a panel discussion with representatives from small, medium and large firms about how to attract and retain talent. The panel featured Cynthia Ring, Chief Human Resources Officer from Harvard Pilgrim Health Care; Eric Tickett, Director of Executive Recruiting for TripAdvisor; Guy Compagnone, LEED AP+, Executive Director of Strategic Partnerships and Education from Chapman Construction/ Design; Geoff L. Cramer, Co-Founder of SocialMadeSimple; and moderated by Betsy Myers, Founding Director of The Center for Women & Business at Bentley University.

Associate *Spotlight*

Over two decades ago, I made a career change from an engineer to a financial consultant and achieved the unthinkable: I don't hate Mondays anymore. I truly cannot express the amount of gratitude I have when someone goes out of their way to help me with even the simplest tasks. My practice revolves around providing my clients with that same feeling, and making sure they know how much I truly appreciate them. I am grateful for the relationships my career has provided me with, as well as the flexibility I have to spend more time with my family. I genuinely look forward to coming into work every day, and I wouldn't change a thing.



Boris Lokshin

Give Back

The Bulfinch Group Charitable Foundation



2015 was an exciting year, TBGCF **donated nearly \$50,000 to 18 different charitable organizations.** This year in addition to our annual Charitable Golf Tournament, the Foundation will host two additional fundraisers to create more funding for the area nonprofits.



THE BULFINCH GROUP
Charitable Foundation

Together, We Make A Difference



During the fourth quarter of 2015, our firm **donated 396 pounds of food** donations to The Greater Boston Food Bank; and signed **700 holiday cards** that were **sent to our troops** overseas.

TBG For Heart Health!

Friday, February 8th was declared **Needham Goes Red Day** to raise awareness for heart health. Despite a snowstorm, Bulfinchers still showed their support by wearing red to the office.



Have Fun

Family Fall Fest



Kicking off the fourth quarter of 2015, and in anticipation of our upcoming merger, our firm hosted a Family Fall Fest event at Belkin Lookout Farm



where over 100 associates and their children, and grandchildren, enjoyed donkey rides, magic shows, apple picking and more.



Holiday Festivities

Our annual holiday party, held at Charles River Country Club, was a perfect way to spread cheer and celebrate with our new Wellesley associates. With nearly 160 people in attendance, attending Bulfinchers enjoyed a festive evening with old and new friends in the firm.



Congratulations

Bulfincher **Michael Elcock** was voted in as the 47th President of Longwood Cricket Club in Chestnut Hill, MA; and **Brilene Faherty**, was re-elected President of The Rockland Chamber of Commerce.

Save the Date

The Bulfinch Group Charitable Foundation's 9th Annual Golf Tournament

Monday, June 13th at The Golf Club of Cape Cod. Sponsorship packages, foursomes, a new golf clinic, and more are now all available for on line sign up. We thank **Needham Bank** for again serving as our Title Sponsor.



For more information, please visit:
www.birdeasepro.com/bulfinchcharitablegolf

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