

# At Meg Green & Associates, it's not about the money

BY LYNN CARROLL

Local financial planner and CEO of Meg Green & Associates Meg Green is getting a lot of national recognition these days. Author R.J. Shook's "Winner's Circle IV: Wealth Management Insights from America's Best Financial Advisors," just out from Horizons Publishers Group, devotes chapter six to showcasing her background and abilities. She's one of 20 standouts in the financial services industry chosen for inclusion, based on assets under management, years of professional experience and client retention.

Using similar criteria, *Barron's*, one of the most respected financial newspapers in the country, listed Meg Green & Associates as one of America's 100 Top Brokers (from a field of 7,000) for the second year in a row.

"It's nice to be recognized by your peers," Green said. "We're feeling very happy about this recognition." It's also a gratifying cap to a career she virtually created for herself out of thin air.

As writer of a regular column in the *Miami Herald* for the past decade and host of a long-running NBC program on financial affairs, Green is well known in South Florida. Her success is the result of determination and hard work.

Twenty-five years ago, she was a divorcee with two young children and very few assets. Good advice, she discovered, was nowhere to be found. So Green took charge of her own future, and forged a career helping others do the same.

"I learned about financial planning," she says. "That's what I needed - someone to ask me what my goals were and tell me what I would have to do to get there. I became that someone."

After four years in the business, she established Meg Green & Associates with a part-time secretary. Twenty-one years later, it's a thriving enterprise with ten other professionals, all hand-

picked for their people skills as well as financial acumen.

"This company is a work in progress," Green says, "with very controlled growth. I look for people with the right work ethic and heart. The thing I am most excited about is that I have built an awesome team to help manage our clients' needs and well being, along with their many hundreds of millions of dollars. And we have fun along the way."

In Green's world, consulting goes way beyond financial planning and portfolio management. "I set this business up to be the kind of place that I would want to come to, and I'm happy to say that's what it is," she says.

"It's not about the money per se. It's all about service, service and service. Service includes attention, caring, heart, brains, ethics. If you're not taking care of your clients, they have a right to leave you."

To Green, taking care of clients means anything from answering or returning phone calls promptly to calling meetings to settle inter-generational disputes.

"We do tons of therapy," she says. "I feel very good about that. It's what makes our boat float. We're honest, ethical and hard working - and we do a beautiful job of managing money, and we're very cost-effective. That's the kind of service that's put us on the map."

Meg Green & Associates is located at 2627 Ives Dairy Rd., Suite 201, in North Miami Beach. To learn more, call (305) 931-1400 or visit [www.meggreen.com](http://www.meggreen.com)



Meg Green

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