

Meg Green Associates CEO shares know-how at advisory summit

BY LYNN CARROLL

At the second annual Top Women Advisors Summit held recently in Palm Beach, some of the nation's top wealth managers heard from Meg Green on how to set up and run an office where staff members think out of the box and are ready to go the extra mile for clients.

Green spoke in her capacity as CEO of the North Miami Beach financial planning and wealth management firm Meg Green Associates, 2627 Ives Dairy Rd., Suite 201, and as one of the top achievers in her profession, as ranked by the experts.

The summit is sponsored by Barron's magazine and RJ Shook, which rates the top financial advisors in the nation. This year, Barron's published a list of the top 100 women financial advisors in the US, including Meg Green, in its June 11th issue.

"The event organizers contacted all the brokerage firms around the country," Green said of the by-invitation-only conference, which focused on businesses that deliver wealth management to high net-worth individuals and institutions. "There were about 500 women there, including many up-and-comers. Those of us in the top 100 spoke, held panel discussions and networked. It was all about women sharing with other women, so it was a nice atmosphere."

Green said she was honored to be a part of the elite event. "Discussing best practices one-on-one with the top women financial advisors in the country

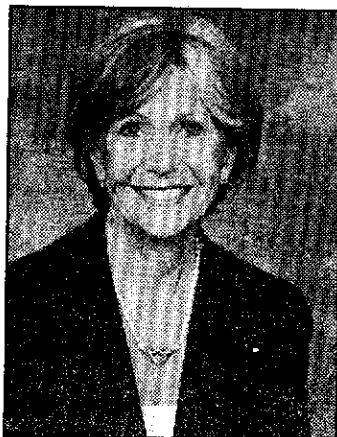
was a unique experience. I'm excited to bring these insights back to my firm and clients."

The women who attended were selected as the top annual producers by their firms, which included Deutsche

Bank Financial Services, Merrill Lynch, Morgan Stanley, Smith Barney, Wachovia Securities and others.

"A lot of these women are in finance," Green said, "but have no idea about how to run a business. Since I've been running Meg Green Associates for 25 years, I've learned quite a bit."

Green says the most important thing to her is taking care of people—and that means scrupulous attention to detail for both clients and



personnel.

"We run interference for our clients," she says. "My day is spent on the phone and with clients, but I also take care of my staff and run the business."

The majority of new arrivals at Meg Green Associates, which boasts a 98% client-retention rate, were referred by other clients.

"What does that tell you?" Green says. "I thrive on taking care of my clients because that's a win-win strategy. People can basically get the same types of investments and advice anywhere. Returns are not going to be so dissimilar. So what do you have to sell? Service, caring and problem-solving-- the things that people want."

For more information, call (305) 931-1400 or www.meggreen.com