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**Meg Green.** A well-respected money manager. An award winning financial planner. Call her what you want. I know her as a psychiatrist, a doctor, a teacher, a guidance counselor, a reliable and straight-shooting professional. A life coach if you will. Meg Green educates, advises, fixes, redirects, and listens, and she has been doing it since 1980. She is also a recognized and sought-after TV and radio personality, but that story has already been told.

It goes back to Mother's Day in 1984, when Meg Green was given an invaluable gift. Her husband Richard put up a wall in his office

and christened it Green's own. It was the start of a celebrated independent career in which Meg Green is the star, but one in which her 500 or so clients are the ones who shine. Her financial planning and investment firm, Meg Green & Associates, is the leader in South Florida, and has been that way because of a unique and unorthodox approach to doing business in the financial services industry.

One of the top-ranked advisory firms in the nation, Meg Green & Associates may offer the same type of product as other firms, but it sets a new standard when it comes to the level of service. "The reason I opened my own firm is

because there was no place I felt I would want to work and no place that I felt comfortable going to for financial advice. My goal from inception was to create an environment clients would feel truly comfortable in, a firm that looked more at the client than at his or her assets, and I believe I have achieved that here," Green says about her Aventura-based office, which is affiliated with Royal Alliance Associates, Inc., one of the largest independent broker dealers in the nation.

With \$340 million in assets managed and a portfolio of affluent clientele, Meg is clearly doing something right in *continued on page 56*





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the way of money management. According to her, most of the value her firm adds is in the level of service. Her 10-person firm epitomizes what the industry terms “full-service,” by balancing cash flow, managing estate taxes, financial planning, even teaching financial manners. Whether it is helping a client with positioning, seeing them through a divorce or managing new inheritance, offering support is what they do best. “We do a lot of hand holding, but if that’s what the client needs, we are here to provide that for them in order to ultimately allow them to enjoy a stress-free financial life.”

Smoothing out the edges for her clients, as Meg refers to it, is what she does best. She offers educated, objective, and unemotional advice. “So much of what I do is emotionally charged – death, sickness, ‘Will I be able to send my child to college?’ ‘Can I afford to retire?’ – I am able to approach a problem and solve it because I am two steps away. I can see straight ahead when perhaps my clients cannot.” As a woman, though, who underwent her own personal trials and tribulations, she offers a certain compassion that makes clients trust her. “Another thing that makes people feel good is utilizing the depth of talent we have. We are able to adjust in any kind of market and establish a balance of assets for our clients so they can sustain a level of wealth and comfort at any point.”

Oddly enough, while she is a pro in the art of balance from a financial standpoint, Meg admits to experiencing difficulty balancing her work and play time. “My days are either on or

off. I can’t do both.” That is why she escapes to her home in Mexico every few weeks to rejuvenate and takes the personal time she owes to her family, and to herself.

For such a high-energy powerhouse in and out of the office, one would assume Meg thrives on the challenge of guiding clients to invest wisely. On the contrary, she maintains that, “change is what makes my job treacherous. Helping people reach their goals is what makes it exciting.” Despite a weak economy, her business remains relatively steady. However, even if the firm’s growth and stability is not affected, Green is highly sensitive to what is going in the market and currently advises people to stay away from long-term bonds and focus on overseas investments, especially Europe, as well as high-dividend paying stocks and income-producing real estate. However, she cautions, “There really is nothing that is absolute, especially because everyone has their own risk tolerance. I just advise based on what I learn. I know I am going into it armed with the knowledge, and knowledge is power,” notes Green, who still writes a weekly column for the business section of *The Miami Herald*.

Of all the titles I have bestowed upon her, teaching is perhaps the most closely related to her current job. When Meg was a fifth-grade teacher, she brought the curriculum to life by presenting it in a way the students would understand. Today, she offers clients a lucid and digestible way in which to comprehend issues and make financial decisions. As she comes up on her firm’s 20th anniversary, Meg retreats to a grade-school quote that, while simple, is perhaps the most profound: “If you want the rainbow, you got to take the rain.” **VP**

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Writer: Risa Chopp-Butbul