

*The Bostonian Group is an innovative, relationship-focused consulting firm that develops customized solutions in the areas of benefits, financial and retirement security, and workforce management. Clients leverage our depth of experience and range of services through our consulting practices which include: Employee Benefits, HR Services, Executive Compensation & Benefits, Retirement and Financial Planning.*



**BOSTONIAN**  
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## Financial Planning Services — Independent advice



The Bostonian Group provides personal attention and comprehensive planning advice for you in the areas of individual financial planning, wealth management and personal insurance.

### Individual Financial Planning

By understanding your goals, aspirations and concerns we can develop a unique vision statement that becomes the heart of a customized financial plan. Areas of expertise include:

- Financial planning
- Investment planning
- Retirement planning
- Estate planning
- Insurance planning
- Income tax planning
- College Planning
- Asset, cash-flow and debt management

### Wealth Management Services

By listening to you we can create a flexible, objective and tax efficient portfolio that we will monitor regularly to ensure that it continues to fulfill your financial planning goals. Utilizing advanced research tools and state-of-the-art technology we are able to offer you leading edge money management capabilities.

### Personal Insurance

Preparing for the unexpected is a critical component in ensuring the success of your financial plan. Using best-in-class insurance products we are able to mitigate these risks for you in the areas of death, disability and long-term care.

### Employee Financial Education

Our financial education classes give employers the opportunity to provide a unique low-cost employee benefit that helps educate employees on how to plan for their long-term financial future. Topics include but are not limited to, financial management, retirement, college planning, estate planning and long-term care.

For more information about our Financial Planning Practice, call us today at 617-587-2300.

*Securities offered exclusively through Raymond James Financial Services, Inc. Member FINRA/SIPC*



First, we listen. Our 360° approach puts your specific needs at the center of the process. Our consultants recommend solutions only after studying the business and cultural drivers unique to your organization.

Employee Benefits | Retirement Services | Executive Compensation & Benefits | HR Services | Financial Planning