



**Gregory P. Munroe,
CFP®**

Senior Financial Advisor
CERTIFIED FINANCIAL PLANNER™
practitioner



Business Experience

1993 to present, Senior Financial Advisor, Ameriprise
Financial Services, Inc., Boston, MA

Designations

CERTIFIED FINANCIAL PLANNER™ practitioner

Education

B.S., 1992, Finance
University of Vermont
Burlington, VT

Areas of Focus

Personal financial planning for retirement income
strategies, investments, wealth preservation strategies,
estate planning strategies, protection planning/family
security and tax management strategies.

I provide sound financial advice to help my clients plan for
financial independence. My clients appreciate a thorough,
honest approach to managing their hard-earned money.
Working together, we can develop a realistic financial plan
aimed at helping you feel secure, informed and in control,
on the road to financial freedom.

Munroe, Morrow & Thorne

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We shape financial solutions for a lifetime®

Mission Statement

We deliver financial solutions for today and tomorrow through a comprehensive and personalized financial planning approach built on a long-term relationship with a knowledgeable advisor.

Backed by Professionals

Backed by a team of professionals who specialize in everything from retirement and tax management strategies to insurance and asset management, our advisors have the resources to support all of your financial needs throughout your life.

Breadth of Products and Services

Whether you're looking for investment strategies, retirement income, funding for your child's education, estate or tax management strategies, we will work with you on your terms. We offer a broad range of financial products and services including mutual funds and certificates, as well as brokerage and financial planning services. We also offer flexibility in the way you work with us: online, with the help of an advisor, or both.

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete the CFP Boards initial and ongoing certification requirements.

For additional important information about an advisor please check FINRA BrokerCheck at www.finra.org/brokercheck or call (800) 289-9999.

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