

Gary Pelletier Has a Mind for Small Businesses and Individuals

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The Entrepreneur's Wealth Planner

Some people like to call the shots. They choose careers that allow them to be their own boss, and masters of their own destiny. These are the entrepreneurs, the self-employed, the small-business owners, the outside salespeople. But since they don't often have a steady income, their financial situation can be unpredictable, to say the least.

To get the most from their finances, these people need a wealth planner who understands not just the ups and downs of the market, but the fluctuations of their own personal economy. In Northern New England, that wealth planner is Gary Pelletier CLU, ChFC, AIF® of Northeast Planning Associates, Inc.

Pelletier has demonstrated expertise in a broad range of areas, including retirement planning, estate planning, income tax reduction strategies and personal investment strategies. He is well versed in both the accumulation and distribution phases of retirement planning for individuals as well as businesses, start-ups through exit planning.



Dealer in the country¹, providing back office support as well as information and objective guidance.

In 2010 Pelletier was named among the Top 100 Independent Advisors in America by *Registered Rep.* magazine², and also a *Barron's* Top 1000 Advisor in February of 2011.³ Beyond the accolades, clients appreciate Pelletier's gift for distilling complex financial matters into an easily digestible form. This allows them to make important decisions in a timely manner.

An Enviable Track Record

One indication of Pelletier's resilience as a wealth planner is his firm's performance over the past two market meltdowns. "In both 2000-2001 and 2008-2009, we not only survived, but aggressively grew our business," he says. "This says a lot about my staff and the faith our clients have in us. We work with a lot of businesses that started out small

and have grown appreciably. Our services cater and adjust to their needs. We have the flexibility to work with businesses of all sizes in addition to individuals at various income and net-worth levels."

Pelletier has the experience and acumen, not to mention the strategic professional alliances, to handle even the most complex financial situations. To stay abreast of the latest developments in wealth management, he formed a study group of his peers from across the country to discuss industry trends, market tools and share ideas. "It's a little like having our own board of directors," he says. "It's just something we do to help keep everything in perspective.

"Things are constantly changing in this business. Not just with our clients, but with the industry itself. We're dedicated to staying ahead of the game. We have some great clients, many of whom have grown to become great friends. The confidence they have in us is not to be treated lightly. Their trust is what we're working for."

- Retirement Income Planning
- Estate Planning
- Income Tax Reduction Strategies
- Personal Investment Strategies
- Educational Funding
- "Exit Planning" for Business Owners



Front row, from left: Lauren Colby, Janet Zale, Elizabeth Salzberg, Debora Dussault; back row: Corey Scrupps, Gary Pelletier, AIF®, Matthew Eaton, CFP®

Leading an Outstanding Team

As quarterback of his multidisciplinary firm, Pelletier oversees all aspects of his clients' wealth planning. His team includes a highly proficient support staff, most of whom are professionally licensed. "What's great about my staff is that I can count on them to back me up at all times," says Pelletier. "They know how to get things done. In addition, we have some exceptional long-term professional relationships with attorneys, CPAs, and other specialists. We have an extensive list of experts to turn to." A key player for Pelletier and his team is LPL Financial, the largest Independent Broker-



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¹ As reported by *Financial Planning* magazine, June 1996-2010, based on total revenue.

² Registered Rep.'s 2010 ranking was compiled in-house by the magazine. According to Registered Rep., advisors who personally manage at least \$150M in assets with a majority in client accounts were eligible for consideration and were ranked strictly by assets under management.

³ Factors included in the rankings: assets under management, revenue produced for the firm, client satisfaction, regulatory record, and philanthropic work.