ABOUT OUR FIRM

Our vision

Our vision is to help our clients meet life's complex financial challenges and to improve the quality of your financial well-being. We do this by partnering with you to develop a manageable course of action based on your values, comfort level, current situation, and timeline.

Esposito Financial Group's Business Approach

We offer a complete range of financial services including portfolio development, estate planning, as well as business, education, and retirement planning services. As an independent financial advisor, I focus on providing an unbiased guidance to help you protect your assets, pursue your dreams, and achieve peace of mind.

The Esposito Financial Group Methodology

We understand that individual needs are different and no one solution is an answer for everyone. Therefore, my approach will be to gain an in-depth understanding of your situation, and to have a clear vision of your future goals and the values that make you unique. Together, we'll go through a comprehensive process for managing your financial life and creating a long-term plan customized to your needs.

Independence Means Greater Freedom

Our commitment to always putting your interests first is evident in every aspect of my business. I've chosen to partner with Commonwealth Financial Network, an independent broker/dealer with a 30-year history of focusing solely on the needs of its affiliated advisors and the clients they serve. This partnership means that I remain free to make recommendations based solely on what's right for you, without bias or pressure to promote a particular product or strategy—which is not the case with some other types of financial advisors.

Services we provide

- Retirement Strategies
- Financial Planning
- Asset Management
- Life Insurance
- Estate and Legacy Planning
- Business Planning
- Risk Management
- Education Planning

About Esposito Financial Group – John P. Esposito, Owner, CFP®, CRPS®, MBA

With more than 30 years of financial planning experience, I've made it my practice and passion to help individuals and families build sound financial plans with an emphasis on retirement planning and strategies. I began my career in 1982 as a Financial Advisor for American Express Financial Advisors, Inc. In 2006, I became an independent financial advisor and founded Esposito Financial Group. I believe each client should have a financial strategy that is personalized to incorporate his or her own unique goals, values, and beliefs. I formed EFG as a way to work my clients one-on-one to develop a financial strategy that focuses on your vision for the present and for the future.

Professional Associations

- Financial Planning Association

Certifications and Degrees

- CERTIFIED FINANCIAL PLANNER™
- Chartered Retirement Plan Specialist℠
- **Suffolk University**
  MBA, 1976, Boston, MA
- **Boston College**
  BS, 1969, Chestnut Hill, MA

Esposito Financial Group

John P. Esposito, CFP®, CRPS®, MBA
5 Lisa Lane | Georgetown, MA 01833 | 978.352.6600 | 978.352.6608 fax | www.espositofinancial.com | john@espositofinancial.com

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