

Adam M. Sachs, CFP®, CLU®, ChFC®, CLTC

Financial Advisor



Assisting individuals, families and businesses in the accumulation and protection of wealth.

- *Comprehensive Financial Planning*
- *Investment Management*
- *Estate Planning*
- *Executive Benefits Design*
- *Retirement Income Planning*
- *Business Succession Strategies*
- *Insurance Needs Analysis*
- *Education Funding Strategies*
- *Charitable Giving Planning*

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Adam M. Sachs is a representative of Centinel Financial Group, LLC. Adam joined Centinel Financial Group after graduating from Babson College in Wellesley, Massachusetts in 1993. Adam's first step in working with clients is to gain an understanding of his clients' current financial situation, taking into consideration their goals and objectives. It is Adam's belief that there are four pillars of a good financial plan: Asset Management, Risk Management, Estate Planning and Tax Management. These pillars overlap at various points; therefore, addressing one aspect of a financial plan can have a bearing, and sometimes a significant impact on another pillar. He then makes personalized recommendations and assists in implementing solutions tailored to each client's unique issues and needs.

Community and industry involvement is also very important to Adam. He has served on the Board of Directors of the Boston Chapter of the National Association of Insurance and Financial Advisors for the last four years and is a past-President of NAIFA-Mass. With Long Term Care Insurance as a sub-specialty, Adam has spoken at various seminars and workshops on the topic, including lectures at Senior Centers, a meeting for the Massachusetts National Academy of Elder Law Attorneys, and the National Long Term Care Forum. Adam was also a member of the review board for the Certified Long Term Consultant (CLTC) designation and has spoken to CPAs for their continuing education credits.

As an active volunteer, Adam has been a proud sponsor of *Set Sail*, a fundraiser for Spaulding Rehabilitation Hospital Network, as well as *Cycle for Haylee*, a bicycle ride to raise money for the Cystic Fibrosis Foundation. Adam was born and raised in Worcester, Massachusetts. He currently resides in Ashland with his wife, Joy; daughters, Ashley and Abigale; and son, Andrew.



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