
Profile

Cary _____ P _____ Green _____
First Name Middle Initial Last Name

cary@greenerafinancial.com _____
Email Address

1100 Cleveland St, _____ Apt 204 _____
Home Address Suite or Apt

Clearwater _____ FL _____ 33755 _____
City State Postal Code

Mobile: (818) 482-4706 _____
Primary Phone Alternate Phone

Length of Residency - please select one. *

1 to 5 years

Do you own or represent a business in Clearwater?

Yes No

If yes, where is the business located? Do you conduct business with the City?

1100 Cleveland St, #204, Clearwater, FL 33755. No business conducted with the City.

Which Boards would you like to apply for?

Pension Investment Committee: Submitted

Green Era Financial LLC _____ Co-Founder, CEO & Financial
Employer Job Title
Planner

Occupation - If retired, enter former occupation.

Financial Advisor

Have you served or do you serve on a board in Clearwater?

Yes No

If yes, please list the name of the board.

Why do you wish to serve on this board/committee? If seeking reappointment, state why you should be reappointed.

As a Financial Advisor with over a decade in this industry, I have significant experience and expertise in the field of investments and I believe I can bring value to our community through serving as a member on either of these boards, which is something I would truly love to do to help/give back to this beautiful City.

What personal qualifications can you bring to this board or committee?

For over a decade I have worked in Financial Services, in Fundraising, insurance, financial planning and investment management. I currently run a Registered Investment Advisor (RIA) called Green Era Financial with my business partner and co-founder, here in Clearwater and our focus is on detailed financial planning and wealth management. We serve clients Nationwide. Currently I hold the following licenses/certifications: 02-15, SIE, Series 6, Series 63, and Series 65. I am also in the process of studying for and obtaining my ChFC certification.

List Community Activities

6 months ago I began working with a group called Uplift Arts, a non-profit with a focus on helping support artists and entrepreneurs to succeed and uplift the community with their art. This is a newer group that's currently in the process of obtaining their 501(c)3 status from the IRS.

[Cary_Green_Resume.pdf](#)

Upload a Resume

Demographics

Some boards and commissions require membership to be racially, politically or geographically proportionate to the general public. The following information helps track our recruitment and diversity efforts. (Optional)

Ethnicity

Caucasian/Non-Hispanic

Gender

Male

07/30/1992

Date of Birth

The City of Clearwater strives to promote diversity and provide reasonable accommodations for individuals with disabilities. If you are requesting accommodation, please indicate below:

By clicking on "I Agree," below, I affirm that the information above is true and correct, and that I understand and agree to the responsibilities and commitment of time associated with an appointment to a Clearwater advisory board or committee.

I Agree

All material submitted to the City of Clearwater is subject to the public records law of the State of Florida including Chapter 119, Florida Statutes.

CARY GREEN

FINANCIAL ADVISOR

📍 1100 Cleveland St, Apt 204, Clearwater, FL 33755

☎ (818) 482-4706

✉ cary@greenerafinancial.com



CAREER OVERVIEW

Over a decade of experience working in Finance, working in fundraising for non-profits, insurance, financial planning, and investment management. Co-founder, CEO & Financial Planner for Green Era Financial, a Registered Investment Advisor.

CERTIFICATIONS

- 02-15 Life & Health Ins License
- SIE Certification
- Series 6 License
- Series 63 License
- Series 65 License

SKILLS

- Financial planning
- Investment selection
- Wealth management
- Investment portfolio design
- Financial risk management
- Tax planning
- Retirement planning
- Fundraising

REFERENCE

Mr. Michael Coleman

SEVC | Transamerica Financial Advisors

michael@mcoleman.com

(818) 481-1484

EXPERIENCE

CEO & Financial Planner

Green Era Financial | 11/2022 - Present

- Financial planning & investment management.
- Serving clients virtually Nationwide.
- Focus on data-driven investment portfolio design & planning for clients.

Financial Advisor

Various Firms | 2018 | 2022

- Worked with Transamerica Financial Advisors, Margo Park Financial and many insurance companies.
- Strong focus on financial planning, investment management & risk management.

Fundraiser

2011 | 2017

- Helped raise over \$50,000,000 for charity.
 - Worked with various Non-Profits engaged in human rights advocacy, disaster relief, educating kids on the harmful effects of drugs, drug addiction rehabilitation, etc.
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