FREEDOM TRAIL
FINANCIAL

You're more than a client. You're our motivation and inspiration.

Our firm serves as a trusted advisor in wealth management, working with our clients to develop smart investment and planning strategies to meet their evolving financial needs through every stage of life.

Freedom Trail Financial, LLC, is an independent, boutique wealth management firm dedicated to helping our clients put their capital to work to so they can enjoy the life they have now, while planning for a future that aligns with their personal and financial goals.

Our mission is to empower clients with the guidance and counsel they need to achieve their financial aspirations while living in accordance with their personal values.

A personalized approach to comprehensive wealth management: We strive to deliver exceptional, individualized, and knowledgeable counsel that aligns with our clients' financial goals and personal values. We specialize in a wide range of financial planning and investment management solutions, from maintaining our client's lifestyle in retirement and protecting current levels of wealth, to thinking about the welfare of our client's children with college education funding and estate planning.

In everything we do, our goal is always to empower our clients with the tools, thoughtful advice and resources they need to achieve a meaningful, secure and happy life.

We advise clients on a wide array of topics including:

- Comprehensive analysis of complex employee benefits packages
- Retirement planning
- Guidance during employment transition processes
- Small business planning for entrepreneurs
- Tax efficient overall investment strategy as related to corporate compensation or retirement planning

ABOUT FREEDOM TRAIL FINANCIAL

As an independent wealth management firm, Freedom Trail Financial is able to provide a wide range of bespoke investment options for each individual situation, and hold our fiduciary duty to place our clients' needs at the forefront of our work.

You're more than a client. You're our motivation and inspiration.

Our founder, Beata Dragovics came to the United States close to two decades ago. She understands first hand what it means to strive higher and she knows the intrinsic personal values that helped get you where you are today. When you are ready, we are here to help.

VALUES THAT ALIGN WITH YOURS

We're lucky: we don't see our jobs as work but the opportunity to spend our days with amazing people we're honored to know not just as clients, but as individuals.

We hold ourselves and each member of our firm to the highest standards of behavior and excellence.

INTEGRITY

We are driven to do the right thing, in the right way first and foremost for our clients, and also as a practice.

EXCELLENCE

We believe that by embodying integrity, applying innovation, developing flexibility, and cultivating growth we empower ourselves to continually strive for excellence in all aspects of our practice, and ultimately for each client we serve.

INNOVATION

We explore new ideas, embrace possibilities, and seek creative ways to expand upon the value we deliver to our clients.

FLEXIBILITY

We view shifts in the economy and the world at large as an opportunity to gain fresh insight and resiliency and to be stretched toward greater growth and wisdom as a practice.

GROWTH

Our passion for purposeful education pursuits are vital to our growth as professionals and as a practice. Our commitment to develop our expertise ensures that we continue to be a reliable source of knowledge.

Beata Dragovics,
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Financial Advisor & Principal

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Commonwealth Financial Network®

Freedom Trail Financial has chosen to work with Commonwealth Financial Network® (Commonwealth), an independent broker/dealer–RIA. This means that our firm remains independent, too. We are free to act solely in your best interest, without bias and without pressure to promote a particular product or strategy. It's a model that differs from that of some other, larger financial firms known as wirehouses, whose financial representatives are accountable not just to their clients, but also to the parent company that employs them.

Commonwealth is also independently owned and managed, which means the firm retains the freedom to allocate resources where they're needed and to act in the best interests of its financial advisors and their clients—not shareholders.