FREEDOM TRAIL

FINANCIAL

Freedom Trail Financial is an independent, boutique wealth management firm that specializes in advising life sciences professionals in their pursuit of financial and personal 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.

YOU ARE MORE THAN A CLIENT. YOU'RE OUR MOTIVATION AND INSPIRATION.

The top minds in the pharmaceutical and biotech sector are in high demand due to the need for specialized skill sets in the evolving and dynamic industry. As a result of our extensive involvement in the sector, Freedom Trail Financial has an in-depth knowledge of the changing financial landscape that generates unique financial planning needs for individuals in this industry.

We work with life sciences professionals and executives to develop comprehensive and customized financial planning, investment management, and compensation strategies that are tailored to help them achieve their professional, financial, and personal goals.

As an independent wealth management firm, we are 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.

We advise our life sciences clients on a wide array of topics including:

- Comprehensive analysis of complex benefit packages
- Tax efficient investment strategy as related to corporate compensation (RSUs, stock options, deferred compensation etc.)
- Assistance in negotiation of offer package when new employment opportunity arises
- Guidance during employment transition process (e.g. reviewing, assessing and strategizing as it comes to previous and current company benefits)

YOUR MISSION IS TO HELP IMPROVE THE QUALITY OF LIFE OF OTHERS; OURS IS TO HELP IMPROVE THE QUALITY OF YOURS.

As a client of Freedom Trail Financial, we strive to create an outstanding personal customer experience by providing the following:

- customized performance reviews, market updates and consultations
- financial expertise pertaining to the matters that are significant to you and your goals
- prompt response to your questions, concerns and inquiries
- invitations to attend FTF educational and social events

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.

OUR PROMISE

Integrity

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

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.

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.

CONTACT:

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Beata Dragovics, founder of Freedom Trail Financial, LLC., was born in a small suburban town near Budapest, Hungary. Her mother set a powerful entrepreneurial example by opening her own CPA firm and encouraging Beata to study English and travel. She relocated to Boston, earned her CFP® certification and, after working at a major brokerage firm in Boston for over 10 years, established Freedom Trail Financial.

Beata earned her Bachelor's Degree in Business Management from the Budapest Business School and in 2016 earned her Master's Degree in Financial Planning from the College of Financial Planning.

She holds the FINRA Series 7 and 66 registrations through Commonwealth Financial Network®.

Follow us on LinkedIn

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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.