



FREEDOM TRAIL
FINANCIAL



**YOU ARE 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.

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.

OUR PROMISE

Integrity

We are driven to do the right thing, in the right way 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®.

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Registered Investment Adviser. Fixed Insurance products and services offered by Freedom Trail Financial, LLC.