



The Lavery Group

Brian Lavery, General Principal, is the founder and co-manager of The Lavery Group at Portfolio Resources. He is a seasoned investment advisor and has been a money manager for more than a decade.

Catherine Scheib, co-manager and General Principal, joined the group in 1998. With years of experience in the regulatory aspects of the financial services industry, Ms. Scheib has supervisory responsibility for the group.

In 2008, The Lavery Group joined forces with Portfolio Resources Advisor Group (PRAG) to launch the firm's SRI/Sustainability Division. Mr. Lavery serves as an Associate Director of the firm and is a member of the Investment Committee. The Lavery Group plays a key role in shaping the policies of the SRI/Sustainability Division.

Being an advisor with The Lavery Group comes with special perks. In addition to quality supervision and the investment services support of Portfolio Resources, the Group offers competitive compensation, health insurance and affordable E&O coverage. Value added branch features include paperless technology, monthly teleconferences, free conference calling with clients, marketing assistance, recruitment incentives and annual retreats.

By keeping you their top priority, The Lavery Group makes it easier for you to stay focused on what's most important: your business and your clients.

If you would like to find out more about how we can assist you, call Brian Lavery at 1-800-598-5075, or email Catherine Scheib at cscheib@prg-group.net. All communications will be kept strictly confidential.

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EACH OF US WILL LEAVE A MARK ON THIS PLANET



WHAT WILL YOURS BE?

Renewable Energy, Conservation, a Sustainable Planet

THE FUTURE OF INVESTING

Sustainable Investing

A growing number of investors understand that they can make a difference by supporting sustainable businesses with their investment dollars. You can help your clients make their voices heard through the investments you recommend and the companies and technologies you choose for their portfolios.



We at The Laverty Group have been dedicated to SRI, Social and Sustainable Investing, our entire careers long before "Going Green" became fashionable.

Today, it is more important than ever to make sure that investments that appear to be "green" actually meet wider criteria of sustainability. We provide clients with the expertise to help them distinguish between the hype and the real thing. After all, where our investment dollars go have far-reaching implications.

Take advantage of our knowledge and experience. Let us help you make a real difference for your clients.

Join Us

The failure of large financial institutions to protect the public good makes clear the importance of working with people who share your ethical values. The Laverty Group is a unique association of advisors who value their independence and focus their practices solely on the best interests of their clients.

If you are an investment advisor with a proven track record and a dedication to serving your clients, we can show you an even better way of doing business. If you are an independent advisor, one thinking of going independent, or just plain tired of business as usual, we would like to meet with you.

The Laverty Group and the SRI/Sustainability Division of Portfolio Resources is committed to providing you access to the best money managers and investment ideas with a clear commitment to sustainable and environmentally friendly investments. We welcome clients and advisors who share the values that are shaping the future of investing.



Portfolio Resources Group

Headquartered in Miami, Florida, the Portfolio Resources group of companies is dedicated to providing a full array of international and domestic investment support services to its independent advisor/brokers.

Portfolio Resources Advisor Group (PRAG) is an SEC Registered Investment Advisor (RIA) offering access to the premier fee-based management platform, Envestnet Asset Management PLC. The group utilizes leading custodians TD Ameritrade, and Schwab Institutional.

Portfolio Resources Group, Inc. (PRG) is a FINRA, SIPC, MSRB, and SIFMA member broker/dealer offering access to global equity markets, ETFs, mutual funds, fixed income, as well as, variable, life and other insurance products. In addition, PRG has an experienced International and Emerging Markets Bond Desk providing an even wider selection of fixed income products to its growing group of independent advisors in the U.S. and abroad. Accounts are held at National Financial, a Fidelity Investments company.

"As a result of its investing strategies, SRI also works to enhance the bottom lines of the companies in question and, in so doing, delivers more long-term wealth to shareholders." - Social Investment Forum.