GROVE BANK & TRUST

High Achiever

Marta Goldberg

Occupation: Managing Director, Fiduciary Wealth Advisor

Company: Grove Bank & Trust

Family: My biggest success in life are my two children who I raised as a single parent; my son is a Doctor in Providence, Rhode Island at Brown University and Daughter who lives in New York and works in the Fashion Business.

Hometown: Miami

Education: Juris Doctorate from South Texas College of Law and Bachelors of Science in Business Administration from the University of Florida

Can you share your wisdom on how to keep a healthy work life balance?

I have a family first philosophy that I live by. It's also important to laugh a lot and you cannot let things physically or mentally affect you. You need to be able to temporarily disconnect when situations become too intense.

Can you name a woman who has made a great impact on you as a leader or mentor and how have they changed your outlook?

My maternal grandmother is the woman in my life who has made the biggest impact on me as a leader. She migrated on a boat by herself from Europe to Cuba at the age of 19 leaving her family and everything she knew behind. She had a very positive outlook on life and was an incredibly intelligent and very progressive for women for her generation.

What was your inspiration to get involved in Wealth Management?

My inspiration for pursuing a career in Wealth Management can be attributed to the ability to use my people skills, business and legal background to coach and advise individuals and families on how money influences relationships and how to best manage significant wealth.

How do you help women achieve financial success?

I help clients identify their financial goals and work in collaboration with additional professional advisors (CPA, Attorney, Insurance Agent) to build a comprehensive, holistic financial plan. My work style is consultative in nature which includes taking the time to understand my clients lifestyle needs, children, spouse and risk tolerance. I am not a YES person. The most important thing is to be able to say NO, explain why and provide alternative options for consideration.

Can you share a specific story about how you build trust with your clients and their families?

My client is an attorney by background who recently came into a large inheritance after the death of her father and twin brother. She has two adult children who are financially astute and see the value in learning how to manage their financial affairs. One of her sons recently wanted to purchase a rental property and rather than his mother paying for the property outright, I persuaded my client to offer her son a 30-year fixed mortgage in the name of an LLC for asset protection purposes and educational purposes to learn about budgets, cash flows, and adhering to payment schedules. My role as a Fiduciary Wealth Advisor not only consists of advising clients on their investment management accounts, charitable trusts and their estate plans but also serving as a mentor and educator for them and their families in order to help them learn how to manage their wealth and make sound decisions. It is imperative that clients get their children involved from an early stage so they have the opportunity to listen and learn about finances, investments, the real estate market and the importance of education.

"I've worked with Marta for nearly 20 years and have never seen anyone more committed to serving her client's needs.

Her education, credentials, experience, and attention to detail are unmatched in my experience.

We are flattered she chose to practice here at Grove Bank & Trust and we are fortunate to have her on our team."

—Charles E. Porter,
President, Trust & Wealth Management Division

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