

## Marly Green, CFP®

### Associate Advisor

[mgreen@bridgeworthllc.com](mailto:mgreen@bridgeworthllc.com)  
205.208.8663 — Birmingham, AL

*"My passion lies in building relationships with clients to help them achieve their financial goals."*

A graduate from the University of Alabama, Marly majored in Finance and Marketing. She joined us in 2020 after spending a year overseas serving with Campus Crusade. Through this philanthropic experience, she found joy in helping others and passion for building trusted relationships.

As an Associate Advisor, Marly is involved with client meeting preparation and execution, data gathering during meetings, and following up on action items. She collaborates with senior advisors in reviewing portfolios and acts as a liaison between the financial advisors and the Bridgeworth planning department.

Marly is a Birmingham native, and she and her husband, Will, currently reside in Mountain Brook. She enjoys experiencing new restaurants in the area and likes to stay active, travel, and spend time with family and friends. Marly and Will are members of Faith Presbyterian Church.



#### AFFILIATIONS

- Financial Planning Association of North Alabama: Board Member, Pro Bono Director, 2023 - Present
- Financial Planning Association of North Alabama: Member, 2023 - Present
- Restoration Academy Advisory Council: 2021 - Present

#### EDUCATION

- University of Alabama, 2019, Bachelor of Science in Commerce and Business Administration, Finance and Marketing
- CERTIFIED FINANCIAL PLANNER™, 2023