

Green Ridge Wealth Planning Celebrates 10 Years of Serving Entrepreneurs and Families as a Trusted Fiduciary Advisor

Firm marks a decade of integrated financial planning, growing from \$0 to \$500M in AUM while helping clients align business strategy with personal wealth goals.

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MONTVILLE, NJ — Green Ridge Wealth Planning, a fee-only registered investment advisory firm founded by entrepreneurs for entrepreneurs, is celebrating its 10-year anniversary. Since its founding in 2016, the firm has grown from a vision of integrated financial planning to a nationally recognized wealth management firm serving business owners, families, and professionals throughout New Jersey and beyond.



Founder and CEO Bobby Mascia, CFBS, launched Green Ridge Wealth Planning with a mission to close the gap between business planning and personal finance, an approach that was

“

The next 10 years will be about scaling our impact. We're just getting started.”

Bobby Mascia

uncommon in the industry a decade ago. Mascia, who grew up in an entrepreneurial family and worked on Wall Street after college, drew on his firsthand experience of thinking as a business owner first and designing financial planning in coordination with that.

“Ten years ago, I experienced what I believe is the

fundamental problem in our industry: entrepreneurs are too often sold financial products or given advice to solve a specific need without considering how that decision impacts the bigger picture of their business and personal finances,” said Mascia.

“I founded Green Ridge Wealth Planning to change that. Through our Wealthficiency™ process, we educate and guide business owners with a coordinated approach that aligns their financial planning, tax strategy, legal planning, and business decisions. We also work alongside their trusted advisors to ensure every aspect of their financial life is synchronized and moving toward the same objectives.”

“The success of that approach is reflected in the trust our clients place in us and in the referrals we continue to receive from both clients and professional partners,” Mascia continued. “There is no greater compliment to me or our team than earning that trust, and we take the responsibility of protecting and growing it incredibly seriously.”

A Decade of Growth and Recognition. Over the past 10 years, Green Ridge Wealth Planning has:

- *Increased its AUM from \$0 to \$500M

- *Brought in Chief Investment Officer Jordan Kaufman, CFA, CFP® as a partner of the firm

- *Grown to a team of 14 professionals, including Client Relationship Specialists, Administrative Professionals, Investment Advisors, and Certified Financial Planners®

- *Earned multiple accolades for the firm, partners, and select employees, including the Inc. Magazine “Best Workplaces for 2024” award and multiple NJBIZ “Leaders in Finance” recognitions

- *Been featured in leading publications including CBS News, Inc. Magazine, NJBIZ, Forbes, U.S. News & World Report, and Success Magazine

- *Established a mission to help 1,000 business owners become exit-ready by 2036, which has led to the formation of the Exit Ready Institute™, a separate business for growth-mindset entrepreneurs

“We’re incredibly proud of what we’ve built, but our focus has always been on what our clients achieve, not what we accomplish as a firm,” said Jordan Kaufman, CFA, CFP®, Partner and Chief Investment Officer. “Every business exit, every retirement secured, every family legacy protected—that’s the real milestone we’re celebrating.”

Looking Ahead

As Green Ridge enters its second decade, the firm remains committed to its founding principles: integrated planning, [fiduciary](#) accountability, and an unwavering focus on entrepreneurial and family wealth.

“The next 10 years will be about scaling our impact,” Mascia added. “We’re just getting started.”

About Green Ridge Wealth Planning

Green Ridge Wealth Planning, LLC is a fee-only, fiduciary financial planning and investment management firm headquartered in Montville, New Jersey. The firm specializes in serving entrepreneurs, business owners, and families who seek integrated planning that connects business strategy with personal wealth goals. For more information, visit www.grwealthplan.com.

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