



## Firm Snapshot

Founded in 1964, BLBB is an independent, employee-owned, fee-only, financial advisory firm providing fiduciary advice, planning, and investment management services to individuals and families, endowments and non-profit organizations, and business owners. We believe financial planning and asset management are complementary disciplines as well as dynamic, and lifelong processes designed to accommodate and flex with your unique circumstances and goals. In our 54+ years of working with clients, we have developed a time-tested process for managing wealth that accommodates and adapts to changing client requirements, varying economic circumstances, and financial markets.

We offer the capabilities of a larger firm coupled with the personal attention of a boutique practice. Our attention to detail, wealth of experience, and broad perspective enables us to deliver customized and comprehensive financial planning resources to our clients. Our primary goals include helping our clients:

- ◆ Make better financial decisions;
- ◆ Avoid taking on unnecessary risk; and
- ◆ Gain better control over their financial futures

We work closely with our clients to help them navigate all aspects of their financial lives. To start, we help clients by developing and maintaining personal financial plans which are then fully integrated into the management of their assets. Our holistic focus on the entire client, and not just their assets, enhances the likelihood of success.

We now work with the third and fourth generations of many client families and are proud of the longstanding, trust-based relationships we have developed with all our clients. We believe the quality and enduring nature of these relationships ultimately results in better client outcomes.

PLAN. INVEST. SUCCEED.™

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