Firm Snapshot

We are an independent, employee-owned, fee-only, financial advisory firm providing investment management and financial planning services to individuals and families, non-profits, and businesses. Founded in 1964, we are working with the third and fourth generations of many client families and are proud of the longstanding, trust-based relationships we have developed. Our clients reside within more than 40 states throughout the United States and we manage approximately $1.9 billion in assets on their behalf. Of the approximately 13,500 SEC registered investment advisors in the U.S., Financial Advisor magazine ranked BLB&B Advisors, LLC as 260th by size for the year ended 12/31/19.

So, what does that all mean? It means we have been around for a long time as a recognized leader in our industry, we have a duty to put your interests before our own, and we have worked hard to develop personal relationships with our clients - which includes knowing what keeps you up at night.

From the beginning, our primary goal has always been to provide our clients with customized and comprehensive financial guidance, asset management and planning services. Our holistic approach focuses on the entire client portfolio and not just the assets we manage. We believe we offer the capabilities and resources of a larger firm coupled with the personal attention and focus of a boutique practice. We help our clients:

- Identify potential issues and make better financial decisions;
- Avoid taking on unnecessary risk;
- Gain clarity around and better control over their financial futures; and, when necessary,
- Build relationships with other professionals (accountants, attorneys, business consultants, etc.)

We believe investment management and financial planning are dynamic and complementary life-long processes designed to accommodate and adapt to ever-evolving circumstances, life events, and goals. Our time-tested Plan. Invest. Succeed.® process incorporates all aspects of a client's financial life into a customized financial plan that is regularly reviewed and updated. Each client's financial plan, including risk management and asset allocation recommendations, is fully integrated into the management of their assets. We use individual stocks and bonds, ETFs, and, where appropriate, risk managed products and private funds to construct and manage each client's portfolio in accordance with the risk/reward parameters identified in their financial plan.

If you are looking for help managing and successfully navigating your financial life and you want to develop a meaningful, long-term relationship with a dedicated and experienced financial advisor, consider adding a BLBB advisor to your team. To learn more, please visit www.blbb.com.

PLAN. INVEST. SUCCEED.®

www.BLBB.com	Mailing address	Street address
215.643.9100	P.O. Box 1010, Montgomeryville, PA 18936	103 Montgomery Avenue, Montgomeryville, PA 18936

2021.0715