

YOUR PATH to a **BRIGHTER** FUTURE



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About Robin Roberts

From the mailroom to the Board Room, Robin spent 40+ years in the banking industry, including starting a new bank in Minneapolis in the 1990s.

He started BrightPath Financial to educate and help people improve their financial position.

Leverage the experience of Robin and BrightPath Financial to learn about how we can improve your financial future together.



Decreasing Your Largest Expense

Sorry to say that it isn't your home! Your largest expense is your future potential tax liability.

As a part of our process, we'll discuss and review your: retirement readiness, tax efficiency, risk diversification and capital deployment efficiency in every area needed to protect and build your net worth.

We look forward to working with you.

Triple Tax Advantaged

Why haven't you heard about one of the best tax-advantaged programs available?

The Benefits of a Health Savings Account (HSA)

Health Savings Accounts (HSAs) offer a range of advantages for individuals looking to manage their healthcare expenses effectively. An HSA is a tax-advantaged savings account designed for those with high-deductible health plans. Contributions to an HSA are tax-deductible, reducing your taxable income and potentially lowering your tax bill. Additionally, the funds in an HSA grow tax-free, and withdrawals for qualified medical expenses are also tax-free, **making it a triple tax-advantaged account.**

HSAs provide financial flexibility, allowing you to save for future medical expenses or use the funds as needed without any deadlines. Unlike Flexible Spending Accounts (FSAs), HSA funds roll over year after year, accumulating if not used. This versatility makes HSAs a powerful tool for long-term financial planning and healthcare management.

You haven't heard about HSAs because salespeople don't make any money on introducing them to their clients!

If you'd like to learn more about the triple tax-advantages of the HSA, contact me to schedule a time to meet with me.