YOUR PATH to a BRIGHTER FUTURE

612-867-5959
Robin@BrightPathFinancial.Solutions

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.

An Invitation

An annual financial review with your planner is essential for keeping your financial goals on track. Life changes—like a new job, marriage, or retirement—can significantly impact your financial plans. Regular reviews allow you to reassess your investments, ensure you're on pace for retirement, and adjust for any tax law changes. It's also a great time to evaluate spending, debt management, and savings strategies.

Meeting annually with me provides an opportunity to discuss new financial goals and ensure that your plan remains aligned with both your short-term and long-term objectives, keeping you on the path to success.

I'm happy to meet you via telephone, Zoom or in-person. Use this link to schedule a time that works for both of us. Or you may always call/text me at 612-867-5959 or email me.

Let's review how your investments are performing, life is treating you and how we can reduce any stress you may have. As a reminder, I specialize in helping my clients to never lose money. Let's get started now!

https://www.vecteezy.com/free-photos