WEALTH
MANAGEMENT SERVICES

BLACKBRIDGE
FINANCIAL

Our Mission:

We are committed to helping you pursue financial independence, a successful retirement, and a lasting legacy.

Client-Focused Wealth Management

Blackbridge Financial focuses on you and the unique set of financial circumstances you and your family face. Getting to know you and understanding your personal needs allows us to create a customized wealth management strategy aligned with your short- and longterm objectives. By building a lasting, personal relationship with you, we're able to help you anticipate needs and plan for the future.

Strategies for Your Wealth Management Needs

We help you create a personalized financial strategy based on your lifestyle goals. Using our discovery process, we work with you to build an appropriate plan that supports your objectives, then monitor it to help you stay on track. Our services and strategies include:

- Retirement planning
- Business strategies
- Investment planning
- Small business strategies
- Estate planning
- Insurance
- Education planning
- Risk management
- Tax strategies
- Gifting strategies

Our Approach to Your Personalized Plan

We use a client-centric process focused on pursuing specific milestones we create together. Our comprehensive, three-step planning process is designed to help identify your needs, implement your strategy, and monitor it to help you stay on course.

1. Assessing Your Needs and Finances

We begin by asking you to complete a confidential personal profile that helps us gain a deep understanding of your current financial situation and goals.

2. Preparing Your Plan

We provide a detailed analysis of your finances, develop a variety of customized strategies, and offer recommendations to address your future needs.

3. Implementing and Monitoring Your Strategy

Once you select the best approach, we put your personalized plan into action. We then maintain consistent communication with you, carefully monitoring your portfolio and making adjustments, when necessary.

We invite you to call us at 704-641-0018 to schedule a consultation and discover how we can help you pursue your financial goals.

There is no guarantee that an investment strategy will yield positive outcomes. Investing involves risk, including loss of principal.

Independence Powered by LPL Financial

Blackbridge Financial is supported by the resources of LPL Financial, the nation's largest independent broker/dealer.* This relationship provides us with thorough research and a comprehensive array of tools, resources and technology. Because LPL Financial has no proprietary products to sell, we have the freedom to offer you thoughtful financial guidance and investment recommendations.

* As reported by Financial Planning magazine, June 1996-2022, based on total revenue.

Blackbridge Financial
Craig Faile, CLU®, ChFC®, CFP®, MBA, AIF®
Accredited Investment Fiduciary
15515 York Rd.
Charlotte, NC 28278
704-641-0018
cfaile@bbridgefin.com
www.craigfaile.com

BLACKBRIDGE FINANCIAL

MKT-08027-0321 Tracking #1-856488 (Exp. 07/23)