



Knowledge is power.

If your advisor isn't asking you questions, your advisor shouldn't be managing your money. To invest for you, we have to know you, and we will take the time to do that. No two investors are alike. At Bridge, we won't plug you into a formula, or an algorithm. We'll sit down and learn

about where you are in life, and
where you want to go.



A bridge to your future.

Wall Street has never been a sure thing. It takes time and patience to reap rewards from the markets —

**“When it is
obvious
that the goals
cannot
be reached, don’t**

and a skeptical eye to avoid losses.

Let us be your bridge to opportunities. They are out there, but it can take work to find them.

Computers are good for some things in money management. But they aren't so good with clients, especially when the questions get hard, or the markets get rough. At Bridge, we'll be right there with you.

Sometimes, the hardest thing to do with investments is nothing. Many people panicked and sold everything in 2008. They missed the rally that followed. Others let it roll in 2000, when they should have taken profit. No one can time the market perfectly, but we can help you keep your head during tough times and boom times alike.

At Bridge, we drive better behavior: save, invest, be prepared, and prosper.

**adjust
the goals, adjust
the
action steps”**

—

Confucious

LEARN MORE



**Your
success is**

our success.

Money can be complicated. Even when it's not, some advisors want you to think it is so they can charge big fees to figure it out. We keep it simple. Why buy a credit derivative when a municipal bond will do?

People with \$1 million to invest often fall prey to advisers charging commissions at every turn. Bridge is different. We charge one fee, no matter what you buy or sell.

Dave Penniall, our founder, knew in the 1980s that this would be the future. Commissions on stocks, bonds and mutual funds were high at the time. Dave wanted fees that aligned the interests of clients and advisors. We prosper when you prosper. Any other fee structure is bad for clients, and bad for business.

“The difficulty lies, not in the new ideas, but in escaping from the old ones.”

— John M.
Keynes

Learn More about
Our Remarkable
Families.

LEARN MORE



**Bridge
to**



your future.

Sign up for the Bridge Advisory newsletter to get news and advice from your family of trusted advisors.

YOUR NAME

ENTER EMAIL

SEND

We want

**our clients
to be
happy,
successful,
and most of
all,
Fulfilled.**



when others ar

Buffett

ss, true happin

aswani

his is the great

ietty

s ever a momen

din

when others ar

Buffett

ss, true happin

aswani

**You
may
have
heard
of us...**



FT FINANCIAL
TIMES

 **GuideVine**

 **EGANGROUP**

Ready when you are.

Give us a call. Send us an email. We'd love to talk to you about where you are, and where you'd like to go. Let us be the bridge to a prosperous future.

YOUR NAME *

EMAIL *

PHONE NUMBER

AREA OF INTEREST

SEND