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Getting you to your financial destination. Safely.

SevenBridge Financial Group is an independent, full-service Registered Investment Advisor dedicated to serving the varying and distinct needs of our clients.

The name “SevenBridge” is derived from the seven bridges that personify our historic city, reaffirming our pride at being a neighbor, friend, and trusted advisor. It also signifies our commitment to delivering profound value through a caring-first approach and bridging the gap from here to the desired destination.

Our Strategic Partners include Charles Schwab Advisor Services, Schwab Charitable, Advisor View™ performance reporting, PCS, a retirement plan record-keeper, and eMoney Financial Planning.