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- Successful individuals and families create and manage insurance, education, retirement and estate plans
- Insurance, accounting, legal and banking firms offer financial services to their clients

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Latest News

Financial and Economic Brief - July 3, 2019

• Stocks Steady amid Threatened Tariffs - Stocks were steady today after the U.S. threatened a new wave of tariffs on European goods, dulling recent optimism surrounding the U.S.-China trade truce.

• GE in Decline - GE's (GE) stock decline, down by nearly two-thirds since the end of 2016, has knocked the company down to the 59th most valuable in the S&P 500.

• OPEC, Allies Extend Supply Cut - OPEC and its allies agreed to extend oil output cuts until 3/20, seeking to prop up the price of crude as the global economy weakens and U.S. production soars.

Request Information

Please let us know how we can serve you.

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Our Firm

Founded in 1966, Roberts Financial is an independent financial services and business consulting service, located in Wellesley, Massachusetts. We believe in the value of direct, personal contact with our clients, so if you require service, or additional information, please let us know and we look forward to contacting you!

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