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Rose Bertram LLC

The Fond du Lac Area Retirement Planning & Investment Resource

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Retirement looks beautiful when you are confident about your finances.

Ask Rose Bertram.

Locally, you have a wonderful resource ♦ an advisor ready to care for your retirement dream.

Rose Bertram helps to remove the mystery from retirement planning by sharing more than a decade of knowledge and insight. She can provide you with an outstanding level of comprehensive financial care before, during and after your retirement transition, and assist you to understand your options.

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Your Road-Map To Endless Horizons

Today's economic environment presents many challenges. But along with these challenges comes opportunities and potential rewards for those who can identify long-term trends.

Whether you're facing retirement—or looking to better understand certain investment ideas—we can help you address your most pressing financial questions.

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"Remember, what does 'retirement' mean? It doesn't mean that you're a couch potato. Leisure is not the same things as rest. If you're bicycling five miles a day, that's leisure, but it certainly takes a lot of effort."

Robert Fogel

Have a Question?

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