

Patti B. Black, CFP®, CSA®

Partner

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"I help people make smart choices about money based on what is important to them - their core values - to make sure their goals and their money are in alignment."

Patti has been providing financial planning and investment advice for over two decades. She focuses on helping affluent individuals create a plan to be financially secure and live a purposeful life during retirement. Her planning also helps clients reduce the likelihood of becoming a financial or caregiving burden as they age. Because Patti has been a member of the "sandwich generation," individuals who are caring for their aging parents and children simultaneously, she understands the financial and emotional challenges that her clients may be facing.

Patti is a thought leader in the firm and leads Bridgeworth University, an education and mentoring program for newer advisors. She is also a member of Birmingham Kiwanis and is a past President of the Financial Planning Association of North Alabama.

In addition, Patti is a contributor to numerous national media outlets, including Forbes, Barron's, Kiplinger's, US News and World Reports, Financial Planning Magazine, InvestmentNews, Market Watch, and Real Simple. She has also been a guest on Talk of Alabama, Grow Your Business and Grow Your Wealth podcast, and the Breaking Money Silence podcast.

Patti and her husband, Doug, have young adult twins, Anna and Luke.



HONORS

- Jack Davis Professional Achievement Award: The University of Alabama College of Human Environmental Sciences 1998

AFFILIATIONS

- Financial Planning Association of North Alabama: Member, Past-President
- Kiwanis Club of Birmingham
- The Church at Brook Hills: Small Group Leader, 2008 - 2014

EDUCATION

- University of Alabama, 1992, B.S. in Human Environmental Science, magna cum laude
- CERTIFIED FINANCIAL PLANNER®, 1996
- Certified Senior Advisor®, 2023