



Business Owners/ Entrepreneurs

Having a financial plan is the first step to having greater peace of mind.

Entrepreneurs and business owners generally share one trait:

a higher tolerance for risk.

It is understandable why entrepreneurs and business owners would have a higher tolerance for risk. After all, some of the biggest thrills in business come from high-risk, high-reward situations.

While boldness in business has tremendous upsides, there are some downsides to taking too many risks with your broader financial future. For example, counting on your success in business to make up for a lack of financial planning, personal saving, and investing is one such risk that many business owners might take.

The thinking is that if I work hard enough and grow my business I will build enough wealth for my retirement. While that may pan out, it is too risky to call this a good retirement plan. You need a plan that considers all of the possibilities, not just the desirable ones.



DECIDE TO OWN YOUR FINANCIAL FUTURE

Everyone has a financial plan, whether it has been carefully and thoughtfully planned out, or it is just happening by accident. Deciding to own and be intentional about your financial future is the first step to having greater peace of mind. Once you make that decision, we can help you get on the path toward making your goals a reality.

ONE-SIZE-FITS-NONE™

You are the only “you” there is. Your financial plan has to be as unique as your fingerprint.

START AN ONGOING CONVERSATION

Even the most high-achieving among us needs a good sounding board. Having someone to really listen to you and ask the right questions can help bring your financial goals into sharper focus.

We realize that revealing your entire financial life to another person is not something you do every day, so it is reassuring to know that the guidance
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and clarity your Bridgeworth advisor provides comes with zero judgment and zero pressure. And, you can be confident in the fact that your advisor is bound ethically to act solely in your best interest.

As the conversation continues, you will make all of your financial decisions. Our role as your financial advisor is to keep you focused and informed on the choices available to you so that you understand how every financial choice you make impacts your goals.

FINANCIAL PERSONAL TRAINERS

To put it plainly, our role is to listen to you to understand what you want your future to look like, and then, coach you all the way there. In fact, that is the best way to think about our role. We are personal trainers who encourage and coach you into a better financial future.

We know you don't have time to speak with a financial advisor. But you should find time to do it anyway.

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