



THE ROAD TO RETIREMENT

We know from working with so many business owners that they care deeply about their employees' financial futures. While retirement plans might not be the most glamorous topic, it's crucial for both the business and its employees.

At BrookBridge Private Wealth, we specialize in 401(k) and retirement plan solutions that deliver personalized value and explore cost savings without compromising on quality. Additionally, and most importantly, each plan participant becomes an individual client, gaining access to our full wealth management team and the comprehensive resources our firm has to offer.

In relationship with LPL Financial, with over \$2.3 trillion in assets¹ under management, we provide the tools, resources, and expertise to help your employees pursue their financial goals. Whether it's working within your existing plan, or exploring new options, we look forward to discussing the possibilities with you!



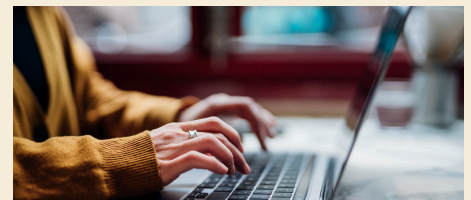
Design the Life You Want to Live

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SERVICES WE OFFER

- ✓ Retirement Planning
- ✓ Investment Management
- ✓ Financial Planning
- ✓ Succession & Exit Planning
- ✓ Insurance Planning

HOW LPL SUPPORTS OUR BUSINESS¹

32,000+ advisors
Nation's largest advisor network

8 Million+
Client accounts served

\$2.3 Trillion+
Brokerage and advisory
client assets¹

24/7 Access
to your account via our mobile
app or online portal

Fortune 500
Company²

¹ LPL Financial, all data as of March 31, 2026. The term "advisors" includes registered representatives and/or investment adviser representatives affiliated with LPL Financial LLC, an SEC registered broker-dealer and investment adviser.

² 2025 Fortune 500

Securities and Advisory services offered through LPL Financial, a Registered Investment Advisor. Member FINRA & SIPC.