

Wealth Management Advisor Financial Planner

Have you thought about your life goals and how to achieve them?

Are you satisfied with your investment performance?

Do you have the time, desire, or knowledge to protect and grow your wealth?



Patrick Bourbon, CFA is the founder of Bourbon Financial Management. He is Chief Investment Officer of ProManage, overseeing more than \$1 billion for more than 60,000 people. He is also adjunct professor at the Illinois Institute of Technology - Stuart Graduate School of Business and has a decade of experience as a portfolio manager and analyst at UBS Global Asset Management where he was Director. Patrick earned the CFA designation, a Masters in Finance, and a Masters in Engineering. He proudly supports many non-profits. He is President of UFEC since 2006, Chairman of Stuart Investments, and Chair of the Finance Committee of the South Shore Drill Team. Patrick is an avid competitor with a strong will to success as illustrated by 10 years of competition in ski and tennis.



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Would you like to double your retirement income?



Bourbon Financial Management

Excellence
Knowledge
Objectivity
Independence
Trustworthiness



Addressing Your Financial Needs

Because you are unique, we work individually with you, personalize our advice and services to better suit your particular needs and improve your own well-being. We offer:

Education on the basics of successful long-term investment to achieve better returns and make informed decisions

A Personalized and Comprehensive Plan that brings you financial stability by optimizing cash flows, improving retirement funding, real estate purchases, estate planning and reducing tax

Periodic Reviews of your investments, including recommendations when changes are warranted



BFM Mission

We make sure that you have enough money as long as you live so that you can enjoy a **comfortable retirement** at a chosen lifestyle. We enable you to fulfill your goals, increase your wealth, and reduce your downside risk through independent conflict-free financial strategies and diversified long-term investments.

- Creating peace of mind
- Achieving financial security
- Providing affordable financial advice

We Help You

- Enjoy happy, golden years
- Create and preserve wealth
- Reduce stressful decision-making
- Generate a steady stream of income
- Save money on taxes
- Provide security for your family

Protecting Your Future

With its independence, knowledge, credentials, and high quality client service, **BFM is the investment advisor you need.**

BFM does not accept third-party incentives, which compromises the **integrity and impartiality** of its advice.

As an independent Registered Investment Advisor, and NAPFA affiliate, we act in a fiduciary capacity for our clients.

We work for you and place your interests ahead of ours.

Realizing Your Goals

Do you want your investments to suit your retirement goals? You bet! Do you want to do the research, make the choices, and conduct the ongoing monitoring necessary to make sure you're on target to meet your objectives? If you're like most of us, probably not.

Planning to fulfill your life goals is an ongoing and complicated process that can bring great rewards. BFM will make your life easier by helping you take an objective look at all the financial facets of your life.