

Success is just the Start



Founded in 1964, BLBB now serves the 3rd and 4th generations of many client families along with individuals, business-owners, and non-profit organizations. Deep, trust-based relationships are integral to our client service approach.

- Manage just over \$2 billion in client assets as of 12/31/23
- Industry leader
- Capabilities and resources of a larger firm
- Clients throughout the US and overseas
- Holistic approach
- Comprehensive and customized financial guidance

BLBB + You

AN INDEPENDENT, EMPLOYEE-OWNED, FEE-ONLY FINANCIAL ADVISORY FIRM

We seek to help our clients:

- Identify potential issues and make better financial decisions
- Avoid taking unnecessary risk
- Gain clarity and control over their financial lives
- Build relationships with other professionals

