

Bob Evelyn

Senior Financial Advisor



Contact Bob Evelyn

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Bob is a big believer in sustainability. Just as we only have one planet, we only have one retirement. Fortunately for Bob's clients, he believes his near 20 years of professional financial wisdom often make a profound positive influence for that specific life stage.

Reducing While Improving

Bob's specialty is in providing defined contribution, defined benefit and non-qualified plan consulting services to plan sponsors and companies with the mission to help their employees.

Along the way, he applies the same principles of sustainability. In the financial sense, he helps:

- Reducing plan costs
- Improving the customer experience
- Making investment plans operate more efficiently
- Exemplifying customer service

This in-depth attention can be the difference between his clients being able to retire—and retiring comfortably—so Bob makes it a point to capitalize on these opportunities whenever possible.

School Is Always In Session

Bob understands the importance of financial literacy. That's why he strives for his clients to recognize him for pouring hours into educating.

He believes what he does sets him apart in the industry: Every year, he aims to hold three teaching sessions: Two for employees and one for employers.

He covers the basics, from budgeting and the difference between stocks and bonds, to advanced material like options trading and establishing trusts.

Second shift, third shift, it doesn't matter. Clients may need Bob's time, whether they know it or not. That's why he spends most of his days reaching out, because even if they don't know what questions they should be asking, he believes it's his responsibility to provide answers.

Outside the Office

Bob does his part to make the world a better place. A seasoned Army service member, he helps veterans find jobs. He also volunteers for numerous local non-profits.

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