



# Let's Connect!



## ROBERT LAMONT

### Advisor

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### OUR MISSION

"To bridge the divide between economic disparities, through comprehensive financial education and equitable access to financial strategies, generally reserved for the wealthy."

### OUR GOAL

To improve the lives of each and every one of our clients through a comprehensive financial planning process - and it's not a 'one size fits all' kind of approach.

Creating custom plans, based on the goals, lifestyle, and situations of our clients, and ensure that they are on the road to financial freedom.

### ABOUT ME

I specialize in providing personalized advice and guidance on investments, retirement planning, and estate planning. My experience in the financial industry has given me the knowledge necessary to help guide my clients toward the best financial decisions.

When I'm away from work, I love spending time with family, friends and my dogs (Diesel and Tucker). I like going for bike rides, dancing, golfing, and getting out on the boat. I still have plans to occasionally travel in the future with my wife, but mostly stay close to home to watch my grandchildren learn and grow.