A&I FINANCIAL SERVICES LLC

Grow your wealth, protect your hard work and choose how you want to be taxed SM

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Bret S. Eberhardt, MBA, Wealth Manager

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Bret S. Eberhardt, Masters of Business Administration (MBA), is a Wealth Manager with A&I Financial Services, LLC. He serves as a trusted professional to his clients, helping both individuals and organizations successfully achieve their financial goals.

Experience and Approach

Bret has worked in the wealth management and financial consulting profession since 2004. Prior to starting his financial consulting practice, Bret ran sales organizations for several IT organizations, including Oracle Corporation and Unisys Corporation. These experiences solidified his understanding of the importance of providing excellent client service. Bret forms deep relationships with his clients, enabling him to help them reach their goals.

It is very important to Bret that his clients understand their finances. Bret takes the time to educate and answer questions, large and small. He takes the time to understand his clients' objectives and formulate a custom plan specifically designed for them. The services Bret provides for his clients include retirement planning, estate planning strategies, risk management, wealth management, and education planning. In essence, he serves as his client's personal Chief Financial Officer (CFO), helping the client grow and protect their investments.

For organizations, Bret applies his years of experience to implement highly effective Qualified Plans/401(k) plans. How? By designing a plan that ensures both the employees and management teams maximize their retirement savings. Using a consultative approach, Bret ensures that his business clients understand the nuances and benefits of their plans.

"The favorite part of my practice is when I see clients physically relax when they realize they are not alone in the financial world."

Education and Licenses

Bret earned his Bachelor of Arts degree from Washington University in St. Louis, Missouri. In addition, he earned his Masters of Business Administration degree from the Leeds School of Business at the University of Colorado, Boulder. He holds FINRA securities licenses 7 and 66, along with Life, Accident and Health Insurance licenses. This includes his Long Term Care certification.

Bret's life revolves around his beautiful wife, Grace, and wonderful son, Brandt. He was born and raised in Colorado and has grown to love all this beautiful state has to offer, including skiing, biking, golfing, hiking and sitting by a warm fire on a cool mountain evening.