



Pictured (left to right) in front of their Spanish Fort location at 9812 Millwood Circle are Adam Bell; Damian Bell, managing partner; Stephen Pierce; Lynn Koors; and James Conwell.

# RockBridge Wealth Management

## Helps Clients Prepare for Retirement

The closer someone gets to retirement, the more critical it is for them to have their financial ducks in a row to retire comfortably. That's where RockBridge Wealth Management comes in.

Led by Founding and Managing Partner **Damian Bell**, a certified financial planner (CFP) with nearly a quarter-century of experience in the financial services industry, RockBridge offers financial planning and investment services that help its clients prepare for – and continue to enjoy – a comfortable retirement. The majority of the firm's clients are nearing retirement age or are already retired.

RockBridge Wealth Management Inc. is the Mobile Area Chamber's Small Business of the Month.

After working with Prudential Securities and Merrill Lynch for nearly a decade, Bell and a partner started the Spanish Fort-based firm in 2001. The goal, according to the firm's website, was "to be free of the quotas, incentives and conflicts of interest that can undermine client confidence and be so prevalent today with many firms."

Operating independently allows RockBridge to offer its clients an unbiased approach and a broad base of products, research and services. In

addition to helping clients plan their retirement, the firm also offers small business owners a low-cost option to implement 401(k) plans for their employees and themselves.

Bell and his team of four are active in the community through churches and other pursuits such as coaching youth sports. "We all believe in having what we call a heart of service," he said.

RockBridge's mission has always been to allow its clients to focus on the most important aspects of their lives – like family, friends and faith – instead of worrying about their investments. But the methods to achieve that end are evolving,

Bell said, as federal regulations force changes in the industry.

"The industry is transitioning away from being transactional to be more focused on advisory services for a fee that covers every service we offer our clients," he said. "The most successful practices will be the ones that can adapt to this new landscape the quickest."

Want to be featured here?  
Go to [mobilechamber.com](http://mobilechamber.com)  
to submit an application, or contact  
Danette Richards at 251-431-8652  
or [drichards@mobilechamber.com](mailto:drichards@mobilechamber.com).