BLACKBRIDGE FINANCIAL

Terry Colen, CRPC
Wealth Manager

BRINGING WALL STREET TO MAIN STREET

Terry, an experienced advisor, started his financial services career in 1988. He is dedicated to helping his clients work toward their financial goals and incorporates humor and a positive attitude to explain complicated issues. As an independent advisor, Terry is able to focus on his clients' needs, not selling products. Prior to joining Blackbridge Financial in 2013, Terry was recognized for excellence* as a leading performer in his field. Terry takes great pride in providing personalized service and financial education to his community, as well as helping his clients understand and navigate the world of retirement income planning and wealth management.

Business Recognition

- 2021, 2019, 2018 LPL Freedom Club; 2020 LPL Director's Club**
- 2018 - 2021 5 Star Wealth Manager***
- Published author in Pride Magazine & Credit Union Times

Education

- California State University - Long Beach, 1985 - Dual Major: Finance & Marketing

Licenses & Designations

- Series 6, 7, 63†
- Series 66††
- Chartered Retirement Planning Counselor (CRPC®)†††

Terry Colen, CRPC

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Securities Registration States: AL, CA, FL, GA, HI, MD, NY, NC, OH, SC, TX, VA | Insurance Registration States: FL, LA, NC, SC

Laurie Spagnualo, LPL Registered Administrative Assistant

Laurie joined Terry's office and Blackbridge Financial November 2016. She spent 7 years with a 4 advisor LPL firm in Central New York and was with a private Broker/Dealer firm in Charlotte for 4 years, before returning to LPL and joining Terry's practice. Laurie handles scheduling the office calendar and any service-related tasks. She currently holds her FINRA Securities Series 6 and Series 63 Licenses†.

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Roselyn Harper, Insurance Advisor

Roselyn has led a successful career in the financial and insurance industries with over 14 years of experience. Roselyn's focus on business development began in 2006, as Sr. Team Lead with The Vanguard Group. As Roselyn continued to develop her personal skills and capabilities, she earned her master's degree in Business Administration and ventured into the world of entrepreneurship by becoming a State Farm Agent. As an agent, Roselyn took pride in building relationships with local small businesses to not only meet their insurance needs, but also in providing guidance towards best practices. Throughout her many years of experience in the finance and insurance industries, her passion continually lies in assisting her clients in striving to achieve their desired outcomes.

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Insurance products offered through LPL Financial or its licensed affiliates

*In 2013, Terry was recognized as a leading performer by CUNA Brokerage Services. This is"awarded to a limited number of financial advisors who demonstrate leadership and success within their credit union and peer groups".
**A recognition as one of LPL Financial's Top Financial Advisors out of the 16,000+ LPL advisors. The LPL Director's & Freedom Club Achievements are based on annual production among LPL Advisors only.
***Award based on 10 objective criteria associated with providing quality services to clients such as credentials, experience, and assets under management among other factors. Wealth managers do not pay a fee to be considered or placed on the final list of 2018-2021 Five Star Wealth Managers.
†Held with LPL Financial
†† Held with LPL Financial and Independent Advisor Alliance
†††CRPC® conferred by College for Financial Planning