

A Difference Maker

Helping You Develop a Personal Strategy

For help developing a personal financial plan based on your unique needs and goals, turn to the financial guidance of Patricia Lampert. Patricia is a caring professional who can help you organize your financial life so you can maximize your return. With Patricia on your team, you can enjoy the confidence and security that quality personal strategies can bring.



“When it comes to my clients, I am on their team. We sit together and develop a plan to maximize their returns, lower unnecessary risk, and put them on a path toward achieving their goals.”

– Patricia Lampert, CFP®



The Retirement Specialist *for*
Working Couples & Empty Nesters

Do You Have a Strategy Based on Your Goals?

Call or e-mail Patricia today and experience teamwork at its best! Schedule a free consultation, get answers to your retirement planning questions, and have an expert help you develop a personalized financial plan for your future!

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Making a Difference

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Making a Difference in Your Financial Future

“Hello Missus Lampert!” the children would say in chorus each morning Patricia Lampert volunteered at her daughters’ school library. Having grown up with eight

siblings, helping the children felt natural. Patricia loved sharing her passion for reading with the children, and helping them pick the perfect books based on their interests. Further, the reward of seeing the children grow and develop on each visit was priceless.

If there’s one thing the students have taught Patricia, it’s that a little bit of help can go a long way in instilling confidence. And that confidence alone can make a tremendous difference in people’s lives. Patricia is known for her ability to help people understand complex issues and make educated decisions. As a financial advisor, she works closely with maturing investors and helps them make the informed decisions that can bring peace of mind and financial security.

A family-oriented person, Patricia knows just how impacting financial issues can be for her clients. Having seen firsthand the financial uncertainty wrought by her father’s untimely passing, she’s committed to preparing her clients for everything the future may hold. “I am proactive with my clients,” Patricia says. “I respect how hard they’ve worked to get where they are and I want to be sure they’re prepared for everything the future may hold.”

Working with maturing professionals, Patricia takes the time to learn her clients’ unique needs and goals. She is an independent, objective advisor who lets her clients’ best interests drive the planning process. Whether her clients are just beginning to plan for the future or seeking to protect and conservatively grow assets as they near retirement, Patricia helps formulate personalized financial plans – an



An involved member of the community, Patricia couldn't think of a better place to build a future for her own family.

investment policy based on their risk tolerance and other individual matters. Her flexible plans are constantly monitored and evaluated to evolve with her clients’ changing needs and lifestyles.

About Patricia Lampert, CFP®

Patricia was born and raised in Philadelphia. She studied accounting in college, with a minor in literature, and graduated from the University of Philadelphia on the dean’s list. Her father, a former police captain, died of a massive heart attack at 51. He died when five of Patricia’s eight siblings still lived at home. Patricia felt inspired to become a personal financial planner after witnessing her family deal with the financial stress her father’s death caused. Before that, she was a financial administrator in the legal industry.

In today’s financial arena, you need someone by your side who can help you focus on achieving your goals. That’s why Patricia Lampert is the financial professional more and more people turn to for the guidance and support they need to succeed.

Call her today and see for yourself how the right advisor can make all the difference for your future. You’ll be glad you did.



Patricia enjoys spending time with her family.



Patricia knows that your goals are as unique as you are. Working together makes it possible to build the future you want.