Bradley H. Bofford, CLU®, ChFC®

Managing Partner

Practice Focus

- Consultative Financial Planning
- Professional Wealth Management
- Independent Investment Advice
- Retirement, Business & Estate Planning Strategies

Certification/Education

- Chartered Financial Consultant® (ChFC®)
- Chartered Life Underwriter® (CLU®)
- NASD Series 6, 7, 63, 65
- Life, Health and Disability Insurance
- Bachelors of Arts, University of Delaware

Affiliations

- Qualifying Life Member, Million Dollar Round Table
- Member, Bergen County Estate Planning Council
- Member, NJ Business & Industry Association
- Elected Member, Securities America Representative Advisory Council
- Qualifying Member, Securities America Masters Forum
- Member, Financial Services Institute
- Chairperson, University of Delaware Alumni Association of Northern NJ
- Fundraiser, Thomas G. Labreque Foundation for Lung Cancer
- Member, Rock and Roll Hall of Fame Foundation

Media Resource

- Featured Speaker - "The Excellence in Financial Planning Conference"
- Quoted - New Jersey Business Magazine, Research Magazine

Helping people make sound financial decisions is certainly not new to Brad Bofford. Having been in the financial services industry for his entire career (beginning with a college internship for Raymond James in 1992), Brad brings an independent approach to his planning. In 1998 he led in creating Financial Principles LLC, a Fairfield-based financial services firm. Brad specializes in providing comprehensive financial planning, retirement planning and asset management services.

As a Wealth Advisor for successful business owners and the affluent in the Greater New York City metropolitan area, Brad advises clients in addressing complex financial challenges in order to enjoy financial independence. The approach in the planning is in a clear, concise, and simplifies manner.

Brad uses a consultative process consisting of Wealth Management, Advanced Planning, and Client Relationship Management. While inspiring introspective contemplation, he helps people discover where they are . . . where they want to go . . . and how they will get there.

Recognized as a Qualifying Life Member of the prestigious Million Dollar Round Table, "The Premier Association of Financial Professionals®", to date Brad has achieved six Court of the Table and one Top of the Table qualifications. He received a Bachelor of Arts degree in International Relations from the University of Delaware in Newark, and went on to fulfill the requirements to become a Chartered Financial Consultant® and Chartered Life Underwriter® through the American College in Bryn Mawr, PA.

Standing by the importance of investing not just in one's own future but in society's as well, Brad is actively involved in several community and charitable organizations. Since 1995, He has served as the chairperson for the University of Delaware Alumni Association of Northern New Jersey. He is a member and fundraiser for the Thomas G. Labreque Foundation for Lung Cancer in New York. Brad and his wife, Lauren are active members of the Rock and Roll Hall of Fame Foundation in New York. While running his business, he always prioritizes his time for his family life with his wife and daughter. Additionally, he thoroughly enjoys attending concerts, sporting events, the arts and traveling.

Financial Principles, LLC

310 Passaic Avenue, Suite 203
Fairfield, NJ 07004
Phone: (973) 582-1000
Email: bhbofford@financialprinciples.com
Web Site: www.financialprinciples.com