Who We Are

Bright Futures Wealth Management, LLC (BFWM) is a SEC Registered Investment Advisor (RIA) located in Pittsford, NY. It operates as an RIA focused on delivering personalized, client-centered service to our advisors who specialize in wealth management, retirement planning, financial planning and consulting. As a whole, the advisors at BFWM oversee more than $238 million dollars in assets under management. BFWM is owned and run by advisors and support staff. Our owners are practicing professionals. They are intricately involved in the area where they have expertise. This allows BFWM to view RIA operations from the advisor's point of view. BFWM builds its own models and portfolios for our team of advisors. Our resources help advisors run their businesses more efficiently.

Vision

Our partners, advisors and staff aim to improve and enhance the financial lives of everyone with whom we work. Our vision is to partner with our clients on their journey to a Brighter Future.

Mission

Our client's financial concerns and goals are the focal points of our business. We create an environment based on trust and long-term relationships to help our clients achieve these goals. Our firm is committed to always conducting business in the best interest of our clients.

Values - Independent, Forward-Thinking & Transparent

We are Independent

We are a Registered Investment Advisory Firm owned by our advisors and some employees. We have no outside shareholders, investors or financial-parent company to which we are beholden. This means we can be fully objective when delivering client advice.

We are Forward Thinking

BFWM was thinking outside of the box when we set up our hybrid RIA. A hybrid RIA is simply an RIA with both a custodial and a broker/dealer partner to conduct fee-based and commissionable business respectively. Notably, the RIA in this instance is not the integrated or wholly-owned broker/dealer offering, but rather a separate business and support function. We anticipate investment opportunities and use innovative solutions other than stocks and bonds by incorporating alternative investments such as structured notes.

We are Transparent

We take pride in providing unfiltered and objective information to our clients. Clients always have full knowledge of their accounts, transactions, recommendations and fees.