

Bridget L. Jarvis

Partner/ Vice President of Business Development



INTRO

Bridget desires to serve financial advisors and employers in Alabama by using her experience in the retirement plan industry to help them accomplish their goals.

Bridget co-founded ERISA Services of Alabama as partner in March 2021. Prior to joining ERISA Services, Bridget served as Regional Sales Representative & Marketing Director for The Retirement Advantage and Plantech, LLP for 15 years.

Bridget relies on her experience and expertise to maximize tax savings for business owners while creating retirement benefits that help her clients recruit and retain top talent. Each client is unique in their needs and it is this challenge that drives Bridget to be the best for her clients.

Through ERISA Services, Bridget serves over 1,500 employers and works with over 400 financial professionals to complement their services in helping her clients achieve their retirement goals.

Bridget's main goal is to grow and develop the Alabama market.

The team at **ERISA Services** is dedicated to the success and well-being of your retirement plan. Through your relationship with our consultants and relationship managers, we will work with you to understand your company, your employees and your employee benefit plan's objectives. We will tailor fit a design for you to achieve these goals as each client has different objectives for their retirement plan.

ABOUT BRIDGET:

Bridget and her husband, Darrin, live outside of Birmingham and are Alabama natives. Bridget earned her BBA Degree in Marketing from the University of Montevallo. She has completed the Pension Administrators Course with ASPPA. She is active in several on line organizational groups that support business women owners and Financial Advisors. Bridget loves spending time with her family, enjoys any activity outdoors, rides Harley's with her husband, hunts, enjoys shopping and even coordinates weddings. She is a member of the Metropolitan Church of God where she serves as an Elder, Ministry Elder and volunteers in the children's ministry and young adult ministry. She co-founded Refuel Ministries with her husband, a Christian based 501©3 that prepares meals on-site for communities during disasters. Bridget and her husband have been married for 31 years. They have a son, Hunter and daughter, Hannah. The newest addition to Bridget's family is her first grandson, Colton, born March 2021.

FOCUS:

To build relationships with financial professionals, and local CPAs, partnering to identify the best retirement plan solutions for their clients.

To increase awareness of ERISA Services' offerings and solutions, and to be a resource for clients, advisors, and CPAs providing strategies which are the best fit to their needs.

To be consistent in her results driven approach and message of reliability, honesty, and enthusiasm with the people she serves.

CONTACT:

EMAIL

bjarvis@erisaservices.com

PHONE

865-218-5735
205-617-2933 mobile

FAX

865-218-5737

OFFICE

1815 Russet Hill Circle
Hoover, AL 35244

" Yet I am always with you: you hold me by my right hand. You guide me with your counsel, and afterward you will take me into glory. Whom have I in heaven but you? And earth has nothing I desire besides you. My flesh and my heart may fail, but God is the strength of my heart and my portion forever.

Psalms 73:23-26

ERISA 3(16)
Services

ERISA Services
of Alabama

ERISA Actuarial
Services
Enhancing Your Savings