



Babita Trivedi, CFP® *Financial Planner*

Babita Trivedi is a Financial Planner with Lighthouse Financial Network, LLC, located in Melville, NY. Babita has a MS in Personal Financial Planning and she is a CERTIFIED FINANCIAL PLANNER™.

Babita is a believer in building a trusting and long-term relationship with her clients. Babita has a strong passion for focusing on her clients' goals and concerns, and providing customized and personalized solutions to help create a strategy for their financial security. Whether it is funding for education or retirement, helping protect those you love, or planning to pass on your estate or business, Babita is committed to using her advanced knowledge of financial planning to advise clients on ways to help them achieve their financial goals.

Babita works with a team of experienced professionals that assist in investment and insurance solutions for her clients. Babita's goal is to ensure that each of her clients receives the most personal and satisfactory service she can provide, so they may create, accumulate and preserve wealth and achieve their dreams.

Babita graduated with a BA from NYU and a MS from College for Financial Planning. Babita lives in Queens, NY with her husband and two sons. She is the Membership Lead for the Long Island Chapter of Ellevest Network. Babita also is the Chapter Head for the Long Island Chapter of the W Source and the President of the Eastern Queens Chapter of the Soloist Collective.

- ◇ WEALTH MANAGEMENT
- ◇ INSURANCE PROTECTION
- ◇ COMPENSATION DESIGN
- ◇ ESTATE PLANNING STRATEGY
- ◇ RETIREMENT PLANNING
- ◇ BUSINESS PLANNING
- ◇ BUSINESS SUCCESSION STRATEGIES

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