

# Rotary

## Club of Shades Valley



### Club Meeting

Shades Valley  
Meets at Birmingham Botanical Gardens  
2612 Lane Park Rd  
Mountain Brk, AL 35223-1802  
Time: Monday at 12:30 PM

### Speakers

January 9th  
[Patti B. Black](#)  
Family Love Letter

January 30th  
[Nicholas S. Zeppos, Former Chancellor/CEO of Vanderbilt University \(2008-2019\)](#)

January 23rd  
[Shegun Otulana](#)

February 6th  
[Tentative - Off Site Meeting at Birmingham Negro Southern League Museum](#)

## Patti Black, CFP, Partner Bridgeworth Wealth Management



Patti has been providing financial planning and investment advice for over two decades. She focuses on helping affluent individuals create a plan to be financially secure and live a purposeful life during retirement. Her planning also helps clients reduce the likelihood of becoming a financial or caregiving burden as they age. Because Patti has been a member of the "sandwich generation," individuals who are caring for their aging parents and children simultaneously, she understands the financial and emotional challenges that her clients may be facing.

Patti is a thought leader in the firm and leads Bridgeworth University, an education and mentoring program for newer advisors. She is also a member of Birmingham Kiwanis, The Women's Network, and is a past President of the Financial Planning Association of North Alabama.

In addition, Patti is a contributor to numerous national media outlets, including Forbes, Barron's, Kiplinger's, US News and World Reports, Financial Planning Magazine, InvestmentNews, Market Watch, and Real Simple. She has also been a guest on Talk of Alabama, Grow Your Business and Grow Your Wealth podcast, and the Breaking Money Silence podcast.

Patti and her husband, Doug, have young adult twins, Anna and Luke.

### Affiliations

- Financial Planning Association of North Alabama: Member, Past-President
- The Women's Network of Birmingham
- Kiwanis Club of Birmingham
- The Church at Brook Hills: Small Group Leader, 2008 - 2014

## Honors & Awards

- Jack Davis Professional Achievement Award: The University of Alabama College of Human Environmental Sciences 1998

## Zoom Details

### Via the web:

<https://us02web.zoom.us/j/84330344512>

Meeting ID: 843 3034 4512

Passcode: Yellowbowl

### Via phone:

+1 312 626 6799 US (Chicago)

Meeting ID: 843 3034 4512

Passcode: 5226307335



## Rotary Club of Shades Valley

P. O. Box 530342

Mountain Brook, AL 35253

[www.shadesvalleyrotary.org](http://www.shadesvalleyrotary.org)

[info@shadesvalleyrotary.org](mailto:info@shadesvalleyrotary.org)

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