

Brad & Carrie Bertrand: *A Family Affair*

As investment professionals, Brad and Carrie Bertrand understand the financial and tax benefits of charitable giving. On a personal level, they want their daughters, Elizabeth and Samri, to appreciate the value of giving back. The family established an advised fund at the Oklahoma City Community Foundation in December 2014.

“Carrie and I want our giving to have lasting benefits,” Brad explains. “We also want our daughters to be active in giving and supporting worthy causes.”

The couple, who met on a cross-country bicycle ride in 1991, own Bertrand Retirement Solutions in south Oklahoma City. Home for the family is Bertrand Equestrian, a 220-acre horse ranch near Blanchard, Okla., that has been in Carrie’s family for nearly 100 years. In addition to being a registered investment advisor, Carrie also competes in equestrian events and is a home school educator. Earlier in her career, she worked as a physics and chemistry teacher. Brad spent 10 years working in investment and commercial banking before opening his own firm. In his spare time, he raises longhorn cattle.

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- Brad Bertrand

Brad and Carrie Bertrand and their daughters, Elizabeth and Samri, at their 200-acre horse ranch located near Blanchard, Okla. The ranch has been in Carrie’s family for more than 100 years.

Photo by Brandon Snider

