



Patrick Carroll

Founder & CEO

Obsidian Planning Solutions

We know what it's like to have to work in your business instead of on your business. You've likely wondered if there's a simple way to put people and processes in place to free up your time to get back to doing what you love.

At Obsidian Planning Solutions, we get it.

With over 35 years of financial and business consulting experience, Founder and CEO, Patrick Carroll has experienced the various pain points business owners feel every day, and was committed to finding a comprehensive solution. His dedication to helping owners grow and protect their business was what led him to create the The Lifestyle Protector Program™. Understanding the value of having continuity, succession and transition plans in place, Patrick developed a simple, step-by-step approach to planning that could be easily incorporated into the hectic schedule of business owners.

When he's not helping clients grow and protect their business, he enjoys traveling the world with Julie, his wife of 37 years and their two grown daughters. Don't worry! When Patrick's on an adventure, he has a team of experts in place who are ready and waiting to assist you.

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PROFESSIONAL DESIGNATIONS

Certified Financial Planner™ (CFP®)

Certified Exit Planer (CEXP™)

PUBLICATIONS

Tame Your Money Elephants

Apple Ridge Press, 2016

EDUCATION

Bachelor of Science, Virginia Tech

Master of Science, The American College of Financial Services

HERE'S HOW IT WORKS:



SCHEDULE A CONVERSATION



ENROLL IN THE LIFESTYLE
PROTECTOR PROGRAM



TRACK & MONITOR YOUR SUCCESS



OBSIDIAN
PLANNING SOLUTIONS