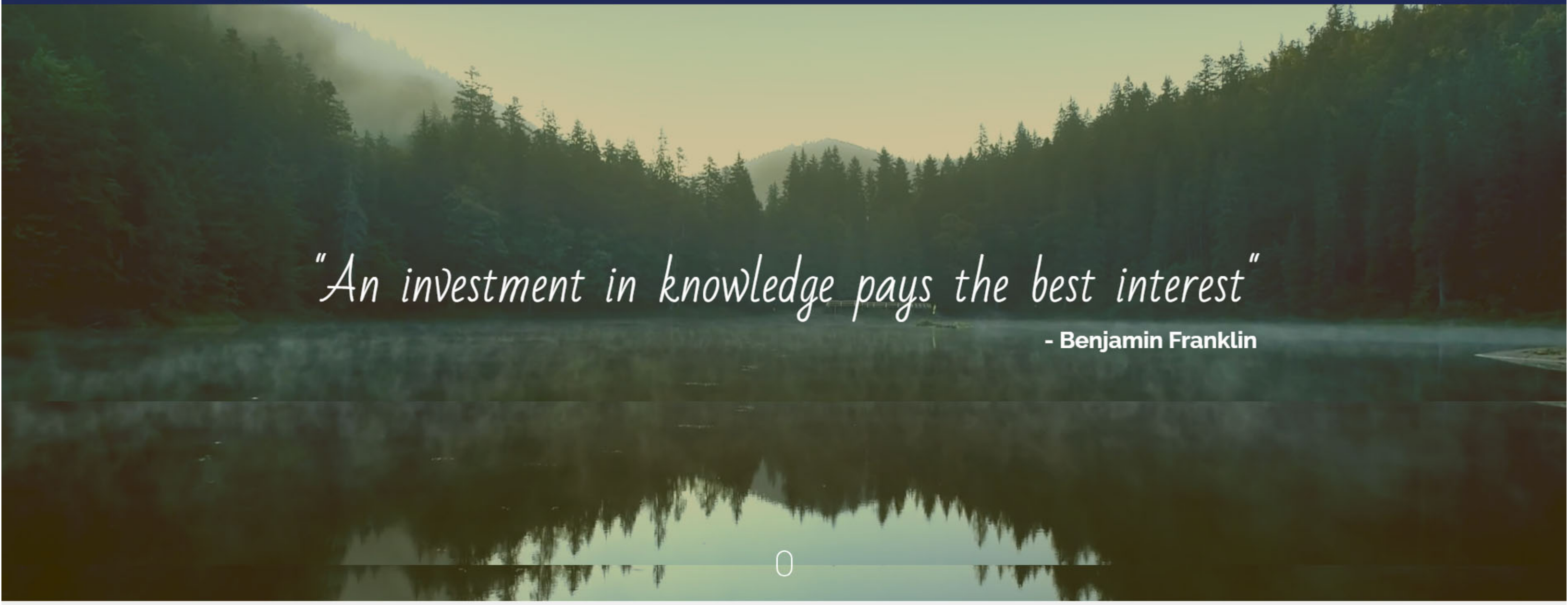


WELCOME TO CLEAR WEALTH PLANNING SOLUTIONS

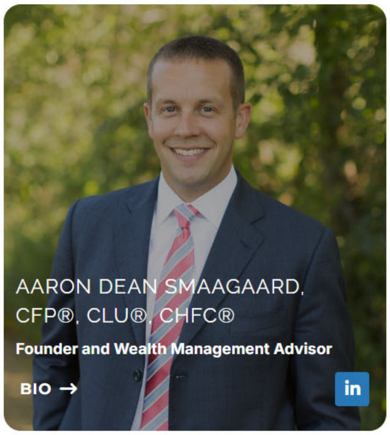
We help our clients work toward financial independence through planning

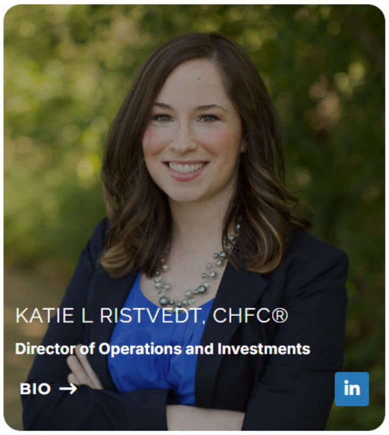
When you work with us, you're part of the family. Our team of professionals have years of experience in financial services, and can help you address your needs today and for years to come.

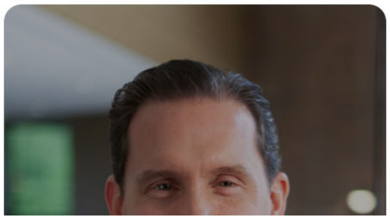
Our goal is to help you live your best life. We want to learn more about your situation, identify your goals and dreams, and understand your risk tolerance. Long-term relationships that encourage open and honest communication have been the cornerstone of our foundation of success.

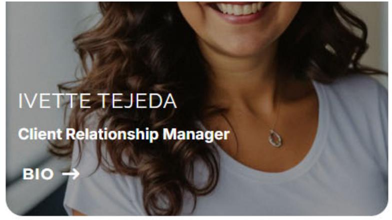
Our entire team works together, hand in hand, always acting in your best interest, with all your goals and dreams firmly in mind. Your goals are our goals.

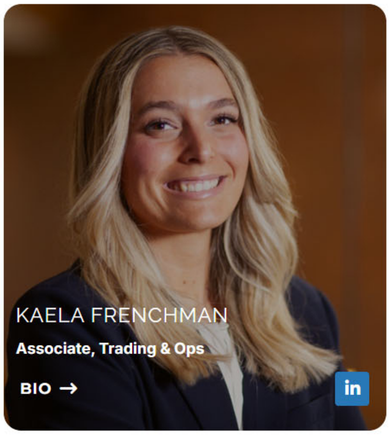
OUR TEAM

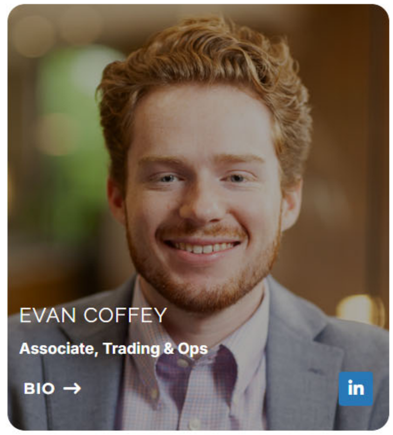












OUR SERVICES

Our advice is tailored to your needs and designed to align your financial resources with your personal goals. We will gain a deep understanding of what is important to you by reviewing all aspects of your financial household, not just your investment accounts. This means you'll receive personalized and actionable advice through each phase of our relationship.

Investment Management

Our investment strategy goes beyond security selection by considering tax efficiency, illiquid investments, asset preservation, debt analysis, and cash flow.

Financial Planning

We see the big financial picture and take a comprehensive look at all your assets, utilizing data and cutting-edge technology to ensure you get a personalized financial strategy that helps you pursue all of your financial goals.

Retirement Planning

Retirement is a major financial t
involves high stakes and irrevoc
clear roadmap with defined mile
you'll be informed and ready wh
phase of life arrives.

OUR PROCESS

INTRODUCTORY MEETING

This is the first part of establishing a fruitful partnership, so be prepared! Our goal is to mutually establish what each of our expectations are and establish whether an ongoing relationship is a good fit. In this phase we will identify your goals, priorities, preferences, as well as potential obstacles.

EXPLORATION PHASE

Based on our first meeting, we now take a deeper dive into your individual financial situation. During this session we begin to sketch a preliminary plan as we engage in a more comprehensive discussion about your personal and financial goals. This phase is essential to developing a customized, comprehensive plan.

DETAILED PLANNING

In this phase we deliver an easy to follow roadmap that will lead you towards your financial goals. We will specifically address the areas that are of greatest importance to you, ensuring that your customized plan is tailored to address those needs. We also spend time explaining and educating you on the plan so you feel confident.

ONGOING AID & ADVICE

As your life circumstances facilitate a different approach to financial planning, wealth management, and savings options, we will be a constant presence to ensure that your plan transitions along with you. Your priorities and goals will inevitably shift through time which is why we are here to proactively update and evolve your financial plan.

All investing involves risk including loss of principal. No strategy assures success or protects against loss.

INSIGHTS

AUGUST 5, 2024

Economic & Market Report: Embrace the Ides of July

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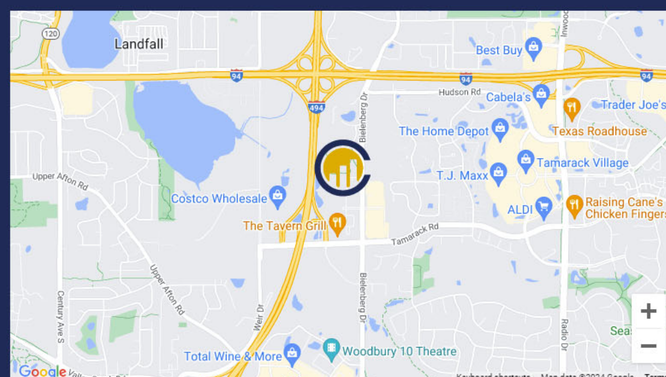
CONTACT US

652 Bielenberg Drive
Suite 201
Woodbury, MN 55125

ivette@clear-wealth.com

(612) 446-3743



LPL Financial Form CRS

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