CLARITY CAPITAL MANAGEMENT

Your future made clear.

WEALTH BUILDER SERVICES

$50K-$600K

- Modular Financial Planning
- Retirement Income Planning
- Employee Benefits Review
  - Deferred Compensation
  - 401k Review
  - Health and Life Insurance
- Asset Allocation Recommendations
- Investment Portfolio Management
- Annual Investment Review
- Annual Retirement Plan Review
- Goal and Objectives Review
- Asset Allocation
- Monthly Newsletter
- Weekly Market Update Email

PREMIERE WEALTH MANAGEMENT

$600K +

- Comprehensive Financial Planning
- Retirement Income Planning
- Employee Benefits Review
- Deferred Compensation
- 401k Review
- Health and Life Insurance
- Estate Planning
- Charitable Gifting Strategies
- Survivor Needs Review
- Long Term Care
- Annual Financial Plan Review
- Goal and Objectives Review
- Education Funding Strategies
- Comprehensive Portfolio Management
- Monthly Newsletter
- Weekly Market Update Email
- Annual Client Appreciation Event
- One on One Appreciation Events
- Quarterly Strategy Meeting
- Annual Retirement Plan Review

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