THE CJ BERRY GROUP
HOLISTIC WEALTH, ESTATE & TAX PLANNING

Fee Based

Independent

Fiduciary

Learn about the 3 Biggest Retirement Threats, download our white paper on the "Perfect Storm in Retirement"

Name

Email

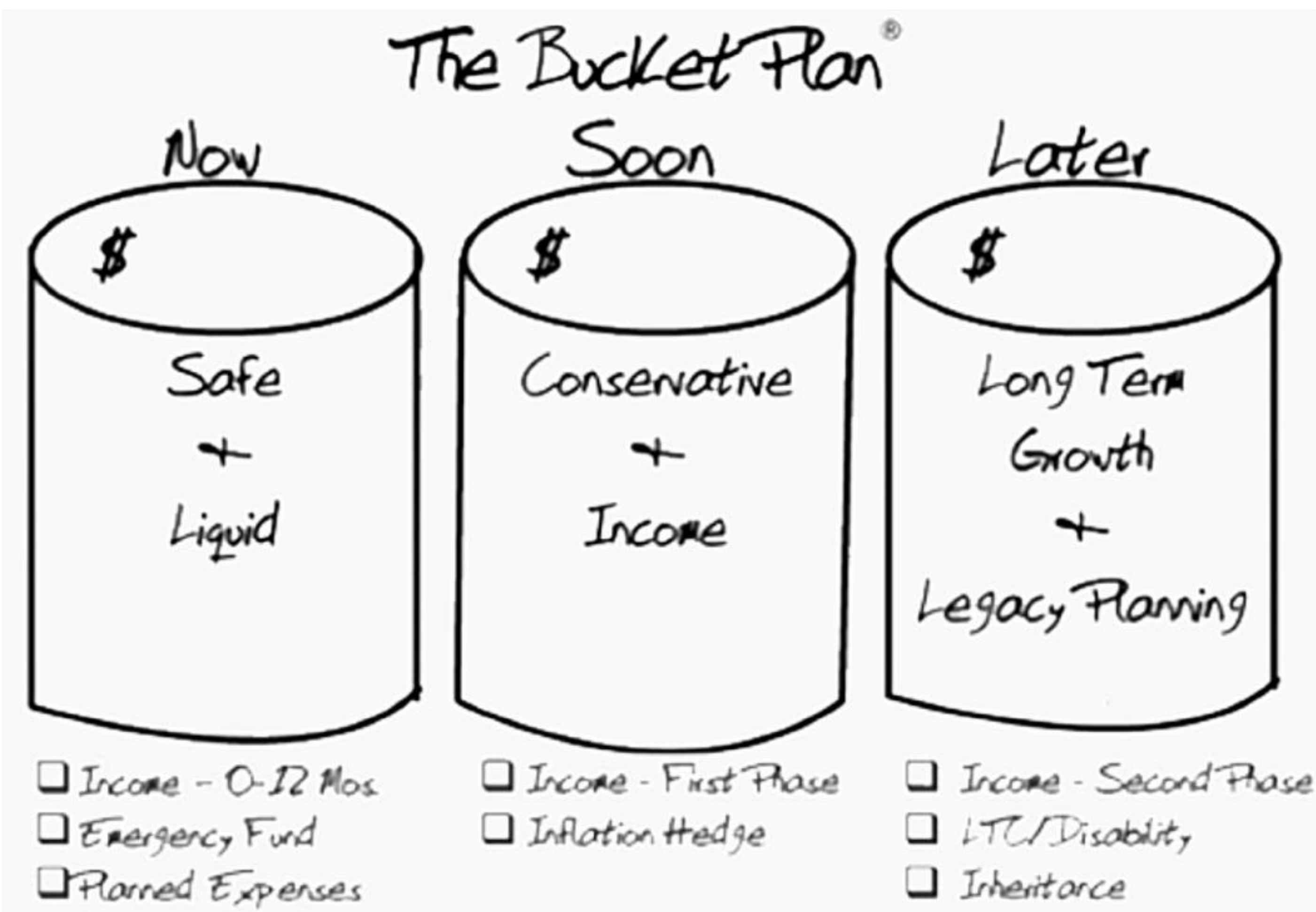
Download Now

The Value of a Holistic Advisor

A holistic advisor is a comprehensive advisor that looks at the big financial picture and provides advice that takes all areas of planning into consideration. Watch the video above to learn more!

Holistic Planning

Orchestrating investments, insurance, taxes, Social Security, Medicare & estate planning into a well-coordinated financial plan.

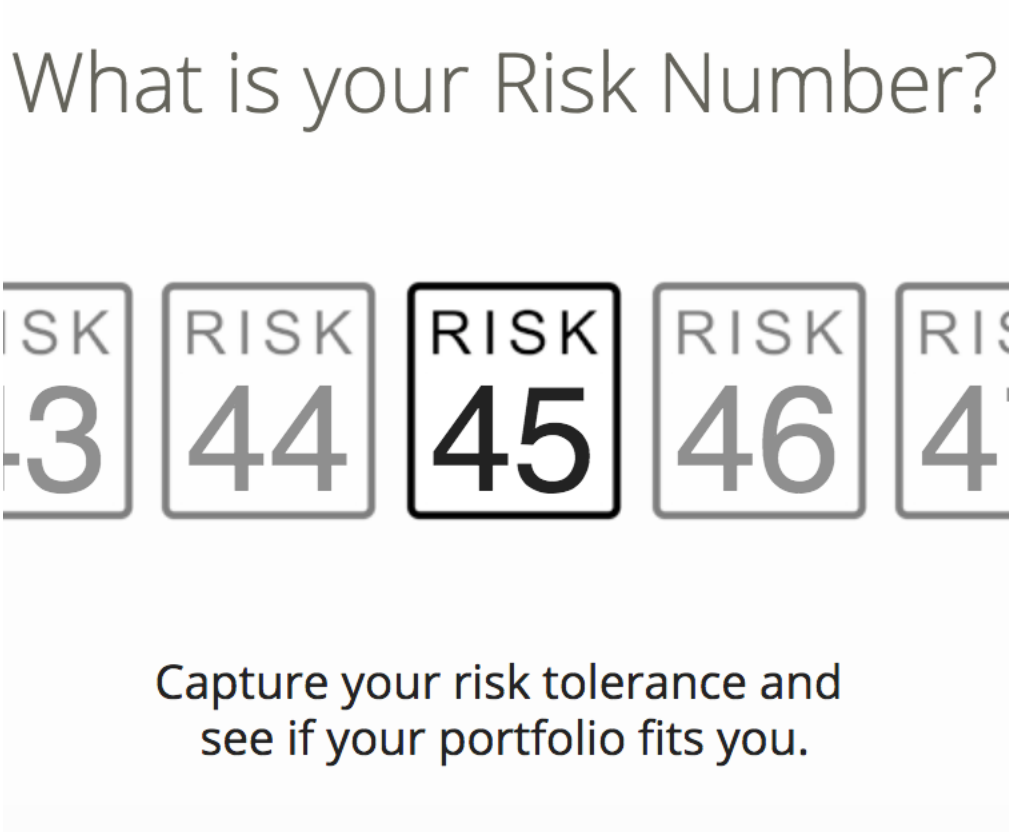


The Bucket Plan

Orchestrating investments, insurance, taxes, Social Security, Medicare & estate planning into a well-coordinated financial plan.

The Trusted Counsel Advantage

With The Trusted Counsel Advantage, you can count on wealth, estate, and tax advice that is in your best interest...not in the interest of a broker/dealer or salesman.



What is Your Risk Number?

The first step is to answer a few questions that cover topics such as portfolio size, top financial goals, and what you're willing to risk for potential gains. Then we'll pinpoint your exact risk tolerance to guide our decision-making process.

Get your Risk Number

Get Started with Holistic Financial Planning

True, holistic, client centered, financial planning is as easy as 1,2,3. 1) Click the Get Started Button. 2) Use the guided process to enter your financial data. 3) View and track your net worth, income, and spending.

Get Started Now

Financial Planning Integration

Take control of your financial planning future with our holistic approach to legal, wealth, and tax planning.

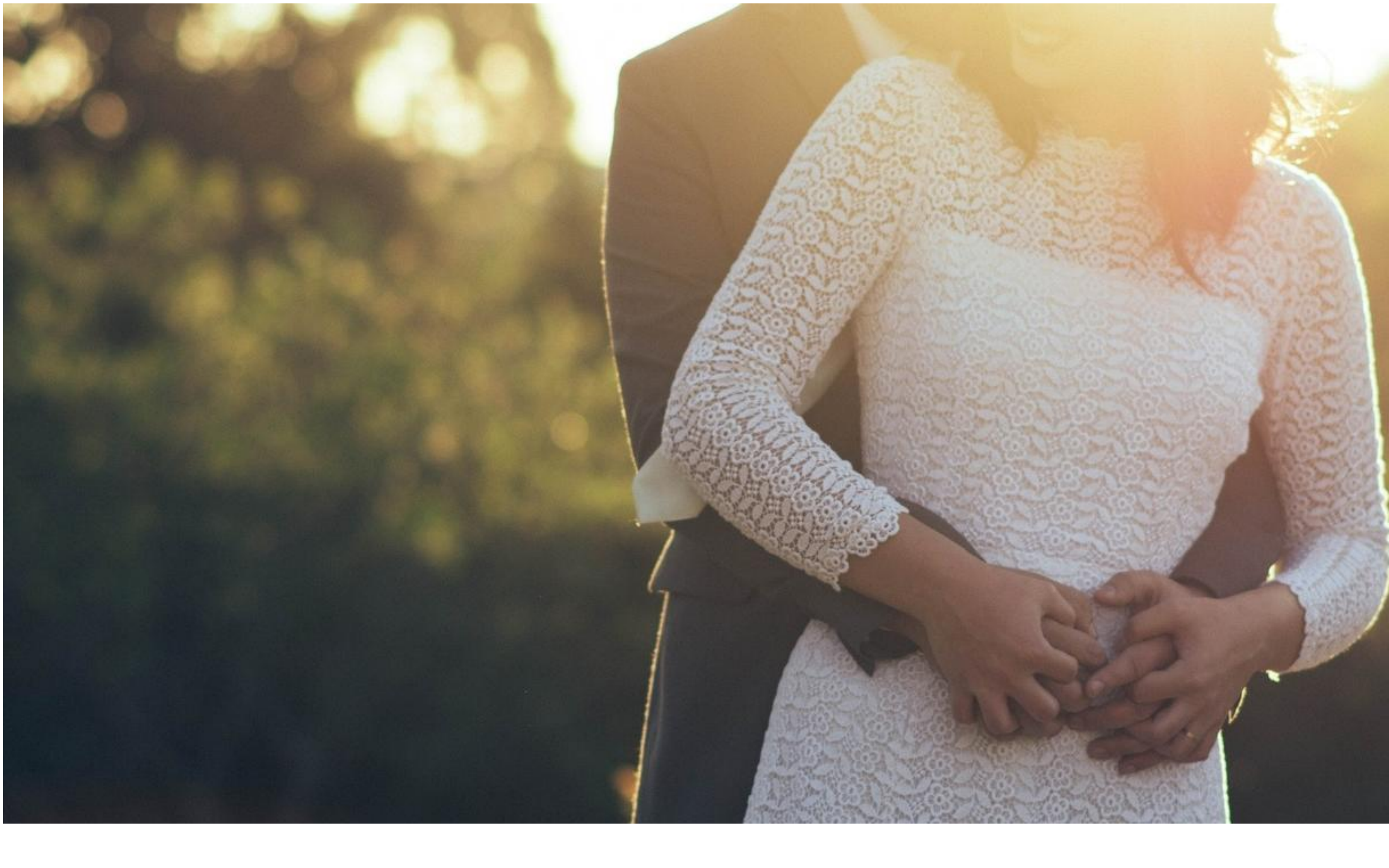
Prosperity Capital Advisors

CLARITY2 PROSPERITY MASTERMIND GROUP

Recent Blogs

Jun 26, 2019

[How Does Bitcoin and Other Cryptocurrency Affect Tax Planning?]()



Jun 11, 2019

[Merging Finances with a Life Partner]

May 30, 2019

[Bringing Up the Topic of Estate Planning with Your Parents]

Contact and Locations

We are here for you. Pick up the phone and call us at (844) 885-4200.

- Main Office | 8550 W. Grand River Ave., Ste. 200, Brighton, MI 48116
- Bloomfield Hills | Americenter Building, 7 West Square Lake Road, Bloomfield Hills, MI, 48302
- Livonia |Americenter Building, 39111 Six Mile Rd., Livonia, MI, 48152
- Novi | Americenter Building, 28175 Haggerty Rd., Novi, MI, 48377

Protect Yourself From 3 Great Dangers in Retirement

With uncertain markets, low interest rates & increased volatility, where can retirees invest today? Learn how to protect yourself from the Perfect Storm in Retirement.

Download the free White Paper Now.

Name

Email

Submit

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