HELPING YOU RETIRE CONFIDENTLY IN THE TREASURE VALLEY

IF YOU'RE WITHIN 15 YEARS OF RETIREMENT, YOU HAVE 15 CRITICAL DECISIONS TO MAKE.
THAT'S WHERE WE COME IN.

CONTACT NOW

"

We are honored to be trusted stewards to our wonderful community. We love what we do, and it shows.

"

WHICH PHASE OF LIFE ARE YOU IN?

WORKING THE PLAN

(HOPING TO RETIRE WITHIN 15 YEARS)

You have unique challenges trying to climb the mountain to retirement. You need a specific retirement plan for this phase of life that you can work toward and stick to. This is called Working The Plan™.

- Organize Financial Life
- Get On Track
- Plan For 'What-If's'
- Update Estate Planning
- Balance Saving Vs. Debt

- Maximize Employer Benefits
- Develop Smart Tax Strategies
- Pursue Investment Growth
- Help Children Get a Leg Up
- Care For Aging Parents

LIVING THE PLAN

(RECENTLY RETIRED)

Even though you have achieved retirement and are living the plan you carefully designed, there are several things still to be considered. You need a retirement plan specific to this phase of life. This is called Living The Plan™.

- Consolidate & Simplify Life
- Plan for Healthcare Needs
- Maximize Social Security
- Enjoy A Fulfilling Life
- Evolve Estate Planning
- Develop Smart Tax Strategies
- Pursue Investment Protection
- Efficient Transfer To Heirs

OUR AFFILIATIONS

TD Ameritrade Insitutional provides custodial services for our clients' investment accounts. Their technology and support teams provide us with a secure way to hold and manage our clients' financial assets. Clients are able to access their accounts online to view account values, statements, and tax documents via AdvisorClient.

CLEAR CREEK
FINANCIAL MANAGEMENT

Clear Creek Financial Management's focus is to equip clients with the best education, advice, and investment expertise to achieve their financial goals. As part of its philosophy, Clear Creek and representatives including Treasure Valley Financial Planning do not "sell" any financial products, and do not believe in any one-size fits all solutions. This means no hidden fees and more importantly no conflicts of interest.

CONTACT US TODAY FOR A COMPLIMENTARY CONSULTATION

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MESSAGE

SEND

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SCHEDULE A MEETING