



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](#)



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

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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 Institutional 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'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

NAME

EMAIL

PHONE

MESSAGE

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PHONE

208-813-9500



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