



(/)

# Planning that is personal



(/about)

ABOUT US (/ABOUT)



(/products)

SERVICES (/PRODUCTS)



(/resources)

RESOURCES (/RESOURCES)



(<https://wealth.emaplan.com/ema/SignIn?ema%2fwfginvestments%2fplumcreekinvestment>)

CLIENT LOGIN  
([HTTPS://WEALTH.EMAPLAN.COM/EMA/SI  
EMA%2FWFGINVESTMENTS%2FPLUMCRE](https://wealth.emaplan.com/ema/SignIn?ema%2fwfginvestments%2fplumcreekinvestment))

Check the background of this investment professional on FINRA's BrokerCheck »  
(<http://brokercheck.finra.org/>)

**SCHEDULE FREE CONSULTATION (/SCHEDULE-FREE-CONSULTATION)**



# Clarus Wealth at Plum Creek

Clarus Wealth at Plum Creek is a wealth management firm located in Castle Rock, CO with a branch location in Peoria, AZ. We are dedicated to providing investment management and strategic wealth planning that is right for you. Our philosophy is simple: we believe that life planning cannot be separated from investment planning. As independent advisors, our interests are aligned with our clients to help them develop a comprehensive plan and take the next step to implement it. We do this through a strong planning process which is the best way to create a more financially secure plan. It is crucial to create a financial plan that seeks to protect your assets now, and that efficiently provides for the future, considering both tax issues and estate planning goals. Simply put, we strive to be our client's trusted advisor.

## Latest Blog Posts

### Financial Planning for College (/blog/financial-planning-college)

With college costs at historic levels, how can you help prevent your child or grandchild from being weighed down with student debt upon graduation? This article ([https://www.jhinvestments.com/viewpoints/investing-basics/tips-to-help-reduce-student-loan-debt?cid=US\\_JH\\_IV\\_EM\\_Marketo\\_ThoughtLeadership\\_529\\_FA\\_CS\\_LK\\_00\\_00\\_DE\\_00\\_AW\\_00\\_00\\_TipsToHelpReduceY](https://www.jhinvestments.com/viewpoints/investing-basics/tips-to-help-reduce-student-loan-debt?cid=US_JH_IV_EM_Marketo_ThoughtLeadership_529_FA_CS_LK_00_00_DE_00_AW_00_00_TipsToHelpReduceY)) by John Hancock may provide a starting point. Want to continue the conversation? Give us a call at 720-510-1199; we'd love the opportunity to discuss how the right plan can help steer your student down the path of financial freedom.

Tags:

[College Debt \(/category/college-debt\)](#) [College Loans \(/category/college-loans\)](#) [Paying for College \(/category/paying-college\)](#)  
[Planning for College \(/category/planning-college\)](#) [Student Debt \(/category/student-debt\)](#)

### Achieving Financial Success (/blog/achieving-financial-success)

In a world which seems to change with each social media post, you can rest assured in our systematic process, aimed at helping you achieve financial success. To learn more about how we are working to assist you, our valued client, with your short-term and long-term financial goals, watch the short video below.

Error loading player: No playable sources found

Tags:

[Choosing an Advisor \(/category/choosing-advisor\)](/category/choosing-advisor)   [Financial Goals \(/category/financial-goals\)](/category/financial-goals)  
[Financial Planning \(/category/financial-planning\)](/category/financial-planning)   [Financial Process \(/category/financial-process\)](/category/financial-process)  
[Financial Success \(/category/financial-success\)](/category/financial-success)   [Financial Videos \(/category/financial-videos\)](/category/financial-videos)  
[Finding an Advisor \(/category/finding-advisor\)](/category/finding-advisor)   [Wealth Management \(/category/wealth-management\)](/category/wealth-management)

[Read more \(/blog/achieving-financial-success\)](/blog/achieving-financial-success)

## Exciting News! (/blog/exciting-news)

Clarus Wealth at Plum Creek's advisor, Karine Beard, was recently announced as a Five Star Top Wealth Manager in ColoradoBiz, 5280 Magazine, and Phoenix Magazine for the 6th year in a row! Congratulations, Karine!

Check the background of this investment professional on FINRA's BrokerCheck »  
(<http://brokercheck.finra.org/>)



# ColoradoBiz Magazine and 5280: The Denver Magazine 2018 FIVE STAR WEALTH MANAGERS

## DENVER



### A SELECT AWARD

Five Star Professional uses its own proprietary research methodology to name outstanding professionals, then works with publications such as ColoradoBiz Magazine and 5280: The Denver Magazine to spread word out about award winners. Each award candidate undergoes a thorough research process (detailed below) before being considered for the final

list of award winners. For more information on how we name outstanding wealth managers, as well as a complete list of winners and our research methodology, go to [www.fivestarpromotional.com](http://www.fivestarpromotional.com).

### RESEARCH DISCLOSURES

In order to consider a broad population of high-quality wealth managers, award candidates are identified by one of three sources: firm nomination, peer nomination or pre-qualification based on industry standing. Self-nominations are not accepted. Denver award candidates were identified using internal and external research data.

- Wealth managers do not pay a fee to be considered or placed on the final list of Five Star Wealth Managers.
- The Five Star award is not indicative of the wealth manager's future performance.
- Wealth managers may or may not use discretion in their practice and therefore may not manage their clients' assets.
- The inclusion of a wealth manager on the Five Star Wealth Manager list should not be construed as an endorsement of the wealth manager by Five Star Professional or ColoradoBiz magazine and 5280: The Denver Magazine.
- Working with a Five Star Wealth Manager or any wealth manager is no guarantee as to future investment success, nor is there any guarantee that the selected wealth managers will be awarded this accomplishment by Five Star Professional in the future.
- Five Star Professional is not an advisory firm, and the content of this article should not be considered financial advice. For more information on the Five Star award and the research/selection methodology, go to [www.fivestarpromotional.com](http://www.fivestarpromotional.com).

### 2018 Five Star Wealth Manager Criteria:

**Eligibility Criteria – Required:** 1. Credentialed as an investment advisory representative or a registered investment adviser. 2. Actively employed as a credentialed professional in the financial services industry for a minimum of five years. 3. Favorable regulatory and complaint history review. 4. Fulfilled their firm review based on internal firm standards. 5. Accepting new clients. **Evaluation Criteria – Considered:** 6. One-year client retention rate. 7. Five-year client retention rate. 8. Non-institutional discretionary and/or non-discretionary client assets administered. 9. Number of client households served. 10. Education and professional designations. 2,255 award candidates in the Denver area were considered for the Five Star Wealth Manager award. 267 (approximately 12 percent of the award candidates) were named 2018 Five Star Wealth Managers.



Alberto Carr - Smith Wealth

Alberto Carr - Smith Wealth

**Karine Beard - Clarus Wealth at Plum Creek**

John Clarke - First Wealth Co

Caroline Cooper - First Performance Wealth

Caroline Collier - Triangle Wealth Management

Angela Corcoran - Wealth Nation

Reya Cooper - Smith and Associates

Kelly Crawford - Present Financial

John Clarke - First Wealth Co

Edie Green - Present Financial

John Gray - Wealth Nation

John Gray

John Gray

John Gray

John Gray

John Gray

John Gray

John Gray

John Gray

John Clarke - First Wealth Co

Tony Cooper - Smith Wealth

Albert Carr - First Performance Wealth

John Clarke

John Clarke

John Clarke

John Clarke

John Clarke

John Clarke

John Clarke

John Clarke

John Clarke

John Clarke

John Clarke

John Clarke

John Clarke

John Clarke

John Clarke

John Clarke

John Clarke

John Clarke

John Clarke

**Karine Beard - Clarus Wealth at Plum Creek**

Check the background of this investment professional on FINRA's BrokerCheck »  
(<http://brokercheck.finra.org/>)



Award winner seen in

Five Star Wealth Manager award administered by Five Star Professional, LLC. The award is based on the following criteria: 1. Registered as a registered investment adviser or as a principal of a registered investment adviser firm for a minimum of 5 years; 2. Favorable regulatory and complaint history review (As defined by Five Star Professional, the wealth manager has not: A. Been subject to a regulatory action that resulted in a license being suspended or revoked, or payment of a fine; B. Had more than a total of three settled or pending complaints filed against them and/or a total of five settled, pending, dismissed or denied complaints with any regulatory authority or Five Star Professional's consumer complaint process. Unfavorable feedback may have been discovered through a check of complaints registered with a regulatory authority or complaints registered through Five Star Professional's consumer complaint process; feedback may not be representative of any one client's experience; C. Individually contributed to a financial settlement of a customer complaint; D. Filed for personal bankruptcy within the past 11 years; E. Been terminated from a financial services firm within the past 11 years; F. Been convicted of a felony); 3. Fulfilled their firm review based on internal standards; 4. Accepting new clients. Evaluation criteria – considered: 6. One-year client retention rate; 7. Five-year client retention rate; 8. Non-institutional discretionary and/or non-discretionary client assets administered; 9. Number of client households served; 10. Education and professional designations. Wealth managers do not pay a fee to be considered or placed on the final list of Five Star Wealth Managers. Award does not evaluate quality of services provided to clients. Once awarded, wealth managers may purchase additional profile ad space or promotional products. The Five Star award is not indicative of the wealth manager's future performance. Wealth managers may or may not use discretion in their practice and therefore may not manage their client's assets. The inclusion of a wealth manager on the Five Star Wealth Manager List should not be construed as an endorsement of the wealth manager by Five Star Professional or this publication. Working with a Five Star Wealth Manager or any wealth manager is no guarantee as to future investment success, nor is there any guarantee that the selected wealth managers will be awarded this accomplishment by Five Star Professional in the future. For more information on the Five Star award and the research/selection methodology, go to [fivestarprofessional.com](http://fivestarprofessional.com). 2,255 Denver area wealth managers were considered for the award; 267 (12 percent of candidates) were named 2018 Five Star Wealth Managers. 2017: 1,716 considered, 287 winners; 2016: 1,552 considered, 515 winners; 2015: 3,008 considered, 517 winners; 2014: 4,385 considered, 528 winners; 2013: 2,083 considered, 607 winners; 2012: 1,965 considered, 611 winners.

©2018 Five Star Professional

202 6th Street, Suite 301C  
Castle Rock, Colorado  
80104 United States

 Tel: 720.510.1199 (tel:720.510.1199)

 [info@claruswealthatplumcreek.com](mailto:info@claruswealthatplumcreek.com) (mailto:info@claruswealthatplumcreek.com)

OSJ Office: Clarus Wealth Advisors  
9125 W Thunderbird Road, Suite 100  
Peoria, AZ 85381

Investment advisory services offered through Clarus Wealth Advisors LLC a SEC Registered Investment Advisor.

Securities offered through Crown Capital Securities LP member FINRA (<http://finra.org/>) & SIPC (<https://www.sipc.org/>)

Clarus Wealth Advisors LLC and Crown Capital Securities LP are unaffiliated companies.

© 2019 Clarus Wealth . All rights reserved.

([https://www.advisorwebsites.com?  
utm\\_source=ind&utm\\_medium=website&utm\\_campaign=poweredbyaw](https://www.advisorwebsites.com?utm_source=ind&utm_medium=website&utm_campaign=poweredbyaw))

Check the background of this investment professional on FINRA's BrokerCheck »  
(<http://brokercheck.finra.org/>)

