Clear Direction for Your Financial Life

Fee-only financial planning and asset management in Ames, Iowa

Who We Are

What We Provide

Common Concerns

A Fee-Only + Fiduciary Firm in Ames, Iowa

As a **fee-only** financial planning and asset management firm, we believe we are best-fitted to truly partnering with clients. With our compensation method, we seek to avoid conflicts of interest that exist when a typical financial advisor gives advice but also seeks to sell investment or insurance products. As a **fiduciary** team, we are committed and obligated to only working together for your benefit, always putting your best interest first.

Clarity Asset Management, Inc. - Fee Only, Fiduciary, Independent

The History of Clarity Asset Management, Inc.

Clarity Asset Management, Inc. was founded in 1998 and merged with Resource Planning Group, Inc. in 2012. Don Erickson started Resource Planning Group in 1986 in order to offer objective advice focused on retirement planning, investment planning, and estate planning. He later helped form Clarity in order to offer an unbiased approach to the management of the financial plans of his clients.

Learn more about our team

Helping Iowans Grow In Financial Health

Impacting Families, Communities, and Future Generations

Our Team

Financial matters can become increasingly complex and it's easy to miss the critical elements of successful financial planning. Many people "get lost in the trees while not understanding the layout of the forest". That's why we are here to help. The Clarity Asset Management team is committed to your financial health. Successful financial planning is making wise financial decisions that lead to peace now and in the future.

Don Erickson, ChFC

Steve Larson, CMFC

Kacy Bass, MFCS, CFP®

Deb Conlon

Julie Siegel

Nevin Conlon, MAT

Serving as the Trusted Financial Advisor in Ames, Iowa

Collaborative Planning, Faithful Management

Our Services

Initial Meeting

DESCRIPTION

This one-time get-to-know-you meeting helps you, and us, decide if we would be a good fit to serve your needs and to decide on a course of action.

COST

Free

Financial Planning

DESCRIPTION

Collaborating with you, we review your financial goals, analyze and evaluate your current financial status, make recommendations, and assist with accomplishing those recommendations. Our focus is in retirement/cash flow planning, investment allocation, insurance review, and estate planning. This usually involves 2-3 meetings.

COST

$500

(No payment is owed until the planning process is complete and you are fully satisfied.)

Ongoing Planning & Management

DESCRIPTION

After going through the financial planing process, we may recommend that you consider continuing in an ongoing professional relationship with us. In addition to financial planning, this includes active investment management, retirement income management, and charitable giving support. We recommend an annual review meeting, but we are available anytime for any need or question that arises.

COST

1%/Year of Assets Under Management

(See our ADV for our tiered fee schedule. The fee percentage decreases on accounts over $1 million.)

Financial Planning

Asset Management

Collaborative Planning

We begin with getting to know you. Every person and family is different, and your personal values and goals are what we use to develop a financial plan with you. Your life purpose(s), as noted in the "Tri-Lateral Pillars of Financial Health" as your "unifying center", is the place where all aspects of your financial health (spending, investing, and giving) are connected. If you are unsure about what your financial goals are, through conversation we can help you discern what drives you: your fundamental worldview and how you want to make a difference in your lifetime according to your sense of identity and purpose. The objective is for you and us to understand this unifying center accurately and harmoniously, and to arrange your lifelong financial plans accordingly. All plans developed for your financial "pillars" of spending, investing, and giving are then shaped by this center. For you to be financially healthy, these pillars must work in concert and address all of your concerns for family, community, and future generations. The plans generated include but are not limited to:

Spending

- Cash Flow
- Budgeting
- Education Planning
- Life & Long-Term Care Insurance Review
- Senior Living Planning

Investing

- Retirement Planning
- Asset Allocation

- Investment Recommendations
- Income Tax Planning

Giving

- Estate Planning
- Utilization of Trusts and Trust Funding
- Charitable Planning
- Post-Mortem Estate Distributions

JOIN US ON THE SECOND THURSDAY NIGHT OF EVERY QUARTER!

Updates

About

Giving History

FAQ

Sign Up

Quarterly Gatherings

Thursday, **July 11, 2019**

Thursday, **October 10, 2019**
Thursday, **January 9, 2020**
Thursday, **April 9, 2020**
5:30 p.m. - 7 p.m. at Jethro's BBQ in Ames

FOLLOW US ON FACEBOOK!

APRIL 9, 2019

1/2019 - Matthew 25 House

Awareness Video for the Matthew 25 House of Ames, Iowa!

NOVEMBER 16, 2018

10/2018 - Ballard Backpack Buddies

Awareness Video for the Ballard Backpack Buddies!

SEPTEMBER 14, 2018

CGC Reminder Video

Community Giving Circle - Inaugural meeting on 10-11-18!

Read More

Financial Planning Guided by Wisdom

Investment Management Driven by Stewardship

Let's Connect

Schedule a **complimentary financial review** to get your most pressing questions answered. Fill out the form below to drop us a note and we'll be in touch shortly.

NAME

EMAIL

PHONE

MESSAGE

Send

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