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CENTRALIZING YOUR FINANCIAL WORLD

**9th Consecutive Year
Barron's Ranks Clarfeld NY's
#1 Independent Wealth Advisor**
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Clarfeld is honored to have been recognized on some of the **world's top wealth advisor rankings** including Forbes and Barron's. See [Important Disclosure*](#)

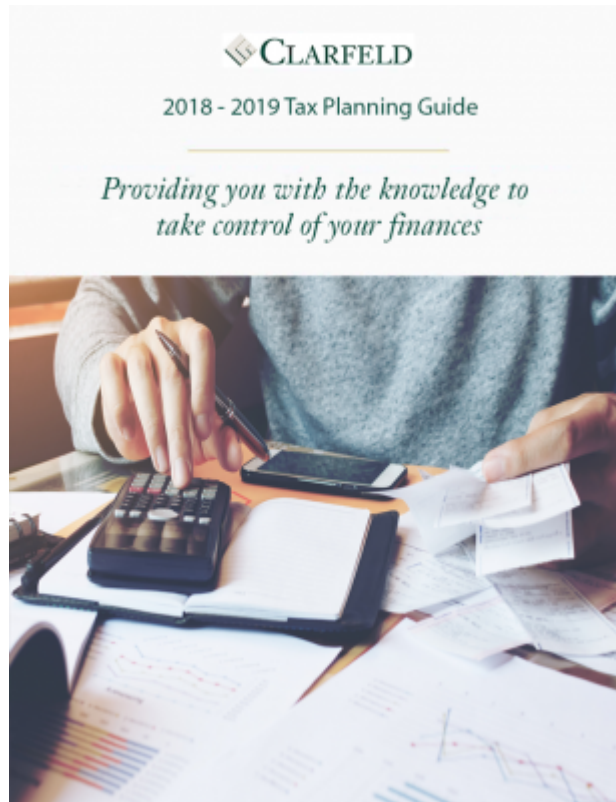
These honors are an affirmation of Clarfeld's "**client-first**" service culture, initiated by Rob Clarfeld and enhanced by our talented team of dedicated partners and staff.

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The Tax Cuts and Jobs Act (TCJA) resulted in noteworthy changes to the US income tax code and, as a result, tax planning strategies need to evolve accordingly. **Our new Tax Planning Guide** highlights the importance of proactive tax planning in light of these changes as well as outlines key developments that every taxpayer should know.

Clarfeld's 2018 Year End Tax Planning Guide

[VIEW TAX GUIDE](#)



Why Work With Clarfeld

As a family's wealth grows so do the complexities around managing, preserving and passing on wealth to future generations. At Clarfeld, we act as a central point of contact coordinating and managing all of your family's wealth and financial affairs. With a hands-on approach and global reach, our wealth managers deliver results and peace of mind across the dynamic financial landscape.

[Learn more](#)

\$+

Billion

Years

+

Professionals



Forbes, Forbes Investment, Investment

Before Bailing On Equities, Answer This One Question

By Clarfeld / June 12, 2019 /

If you are considering temporarily bailing on equities, essentially trying to time the market, consider whether timing your reentry point isn't even more risky than...



Wall Street Muted as Rate Cut Bets Temper Trade Tensions

June 6, 2019



For An Estate Plan To Work As Intended, Assets Must Be Properly Titled

May 20, 2019



Headline Risk Takes Center Stage for Markets

May 14, 2019



Michael Hans Shares His View of Current Market Volatility in Forbes Article

May 13, 2019



Investors Ponder Holding On or Cashing Out of Record Rally

April 24, 2019



Shortening Duration on Existing Exposures

April 24, 2019



Company Benefit Plan Designations Can Lead To A Huge Estate Planning Blunder

April 22, 2019



Preserving Tax Benefits For Charitable Contributions When Utilizing The Standard Deduction

April 11, 2019

The Clarfeld Report

Read our most recent Quarterly Investment Report

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