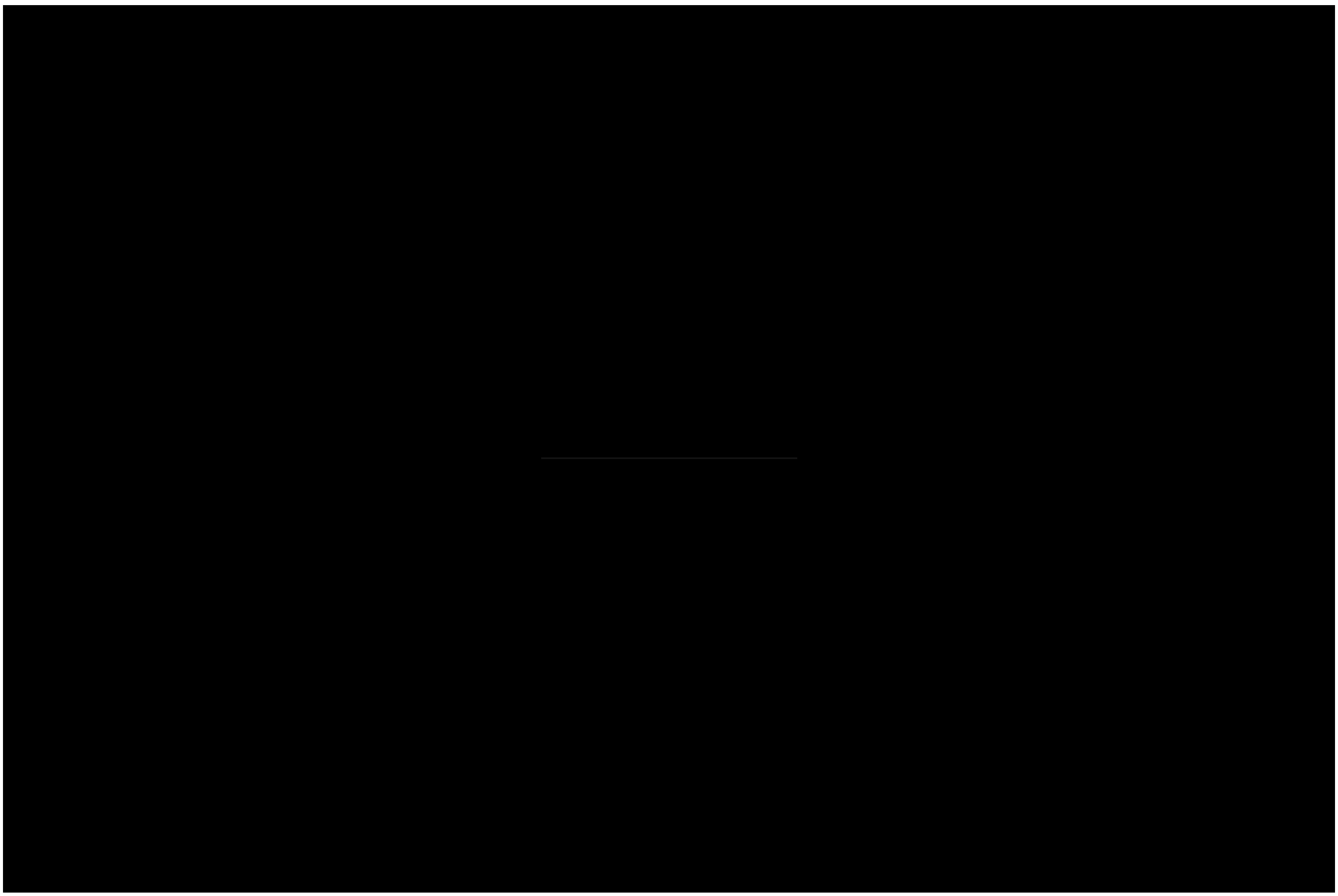
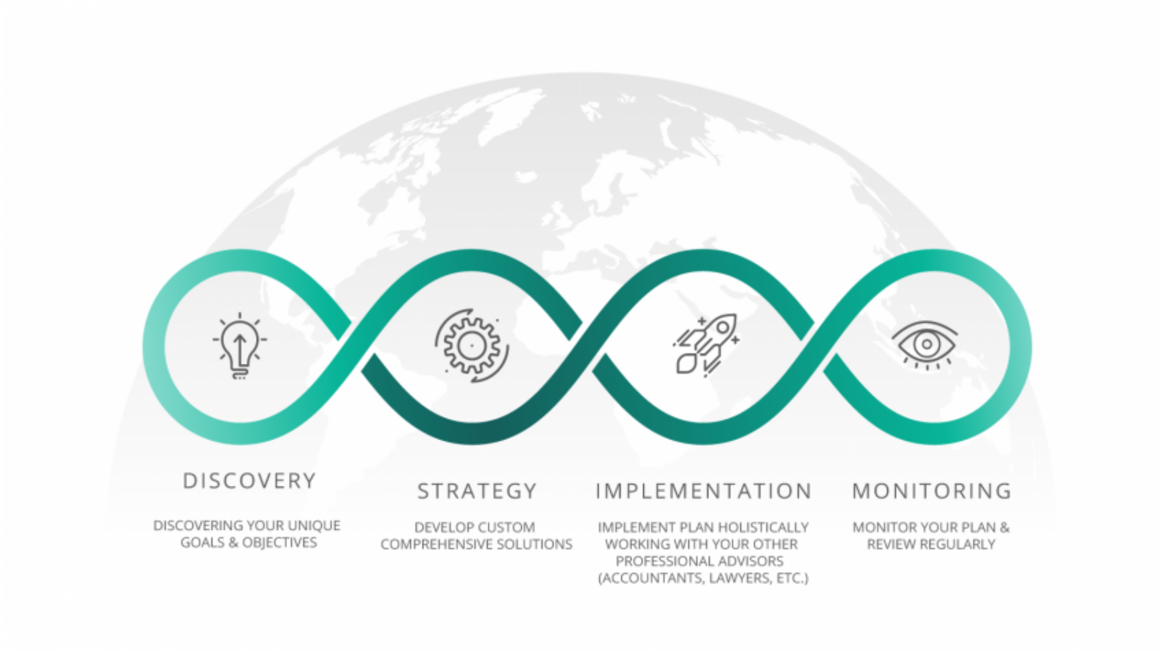
CLARO ADVISORS



# We believe in better financial planning

Most financial advisors might start by proposing different investments or recommending that you buy a product or sell your existing investments. We think differently at Claro. The process starts with you.

Our passion is working with clients to deliver a world-class experience. We love what we do. Our purpose is to simplify and manage your financial life so that you can give attention to the endeavors that you care about and that demand your time.




## UNDERSTANDING YOU

The relationship begins with a discovery meeting. This helps us get to know you, your family, and your business. We want to hear your story and learn to appreciate how you got to where you are. We'll ask lots of questions and gather data from you that enables us to better add value to your specific situation.

# Where We Can Add Value To You

### CLARITY & EXPERTISE

Claro's team is experienced in working with clients through many different life events. We understand that these circumstances bring about lots of questions and typically involve many emotions. We bring clarity to your financial situation to help you avoid emotionally driven decisions that impact your investment portfolio and overall financial plan.

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SCHEDULE A NO OBLIGATION DISCOVERY CALL

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LEARN MORE ABOUT OUR PROCESS

MEET THE CLARO TEAM

LIQUIDITY EVENTS

Whether you're selling restricted stock, stock options, or have other liquidity, we'll help you manage your concentrated position, diversify your portfolio, manage tax exposure and devise a new long-term plan for your investment portfolio to match your stated objectives.

RETIREMENT

You've spent your entire life working hard to create a nest egg. But you're not sure if it's enough. At Claro we work with you to ensure that your investments are aligned with your long-term needs.


SELLING A BUSINESS

After pouring your heart and soul into building a business we understand the challenges you face when selling a business. Our team has the resources to help you figure out the best possible exit strategy and what to do with your investments once they become liquid.

LEGACY

Understandably a very emotional process. Our team works with clients to ensure that the investment portfolio is aligned with the estate plan so that you can focus your time on what matters to you.

DIVORCE

This life event forces you to deal with both financial and non-financial matters. Given your time constraints, our divorce planning specialists will help you manage the investment portfolio so that you can devote your time to other important matters. We'll work rigorously to get you the best financial settlement possible.

INHERITANCE

For some clients this may be their first time coming into significant assets. Many questions come along with inheriting wealth. We'll work with you to create

an investment portfolio that fits your new long-term objectives.

INSIGHTS BY OUR ADVISORS HAVE BEEN FEATURED ON

THERE'S NO TIME LIKE THE PRESENT

# Let's Schedule a Discovery Call

**We offer a complimentary "Get Acquainted" meeting to learn about your financial goals and see if our services are right for you.**

First Name

Last Name

Email address

CLICK TO SCHEDULE

## Recent Articles from Our Advisors

How High Earners Can Fund Roth Accounts - A Few Strategies
Robert E. Dockendorff, JD, LL.M

Roth Conversions and Tax Rate Arbitrage: Not As Confusing As It Sounds
Robert E. Dockendorff, JD, LL.M

Tax Loss Harvesting Part II: An Enhanced Strategy For High Earners
Robert E. Dockendorff, JD, LL.M

Tax Loss Harvesting Part I - Take the Easy Money
Robert E. Dockendorff, JD, LL.M

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