



Everyone at CiR has a strong desire to help people and we do this with more than 35 years of professional experience working with clients in the institutional arena. Having this experience, knowledge, and sophistication, we align our financial services with the clients' individual objectives, timeframe, and risk tolerance. Through forward thinking, we are able to deliver customized choices with research-based tailored solutions. Establishing a close relationship with each of our clients is very important to us. As an investment fiduciary, we place our clients' financial needs first with complete transparency.

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At CiR, we want our clients to feel confident with the care and service we provide while maintaining adaptability to the market. We allocate money across various asset classes with the goal of delivering respectable risk-adjusted returns. CiR's ability to provide value through tactical asset allocation and manager selection is supported by our dedicated research team that monitors macroeconomic, quantitative, and fundamental, level research indicators in the market.

*We maintain both E&O Insurance and an ERISA Bond.*

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## VALUE

Using a variety of strategies, we provide customized investment management to assist our clients in prudent risk taking as a tool to help them reach their version of financial success.

Working together, we assist with procedural steps, which are monitored to provide measurable results.

*01*

**AFFIRM  
AND  
SUPPORT**

*02*

**FURTHER  
STRENGTHEN  
COMMITMENTS**

*03*

**FOCUSED  
ON ASSET  
GROWTH**

*04*

**RISK  
CONTROL**

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It's simple. At Clear Investment Research, our culture is our guide. Each member of our team has a voice and a direct impact that is equally respected. The success of our company has been built on a foundation of integrity, shared beliefs, reliability and understanding.





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**DISCLOSURES**

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