CLEARSTONE WEALTH MANAGEMENT

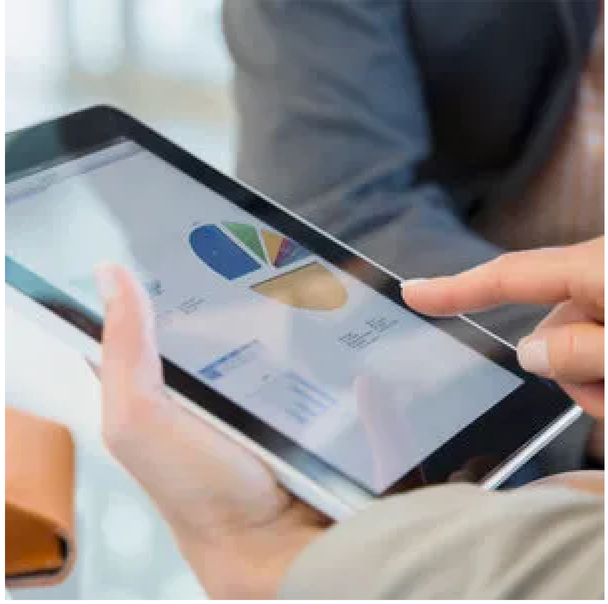
(877) 926-6922

PERSONALLY DESIGNED. PROFESSIONALLY MANAGED.

Fiduciary • Independent • Fee-Only

GET IN TOUCH

WE'RE DIFFERENT. BY DESIGN.



Personalized Wealth & Life Planning

Your investment portfolio is much more than a 401(k). It includes your income, your finances, your retirement accounts and other investments such as stock options, your business or practice, real estate and rental properties. Together, your total wealth should be brought into a cohesive alignment with your near-term and long-term goals, the amount of risk you are comfortable carrying, the uniqueness of your life, your dreams, and your circumstances.

For this reason, we work with you to complete a comprehensive, goals-based financial plan that is used to create and manage a customized investment portfolio that gives you the best chance of reaching each one of your goals.

Your plan is unique. And when your situation changes? Your plan will change, too.

Professional & Comprehensive Wealth Management

Although we design and manage customized portfolios, we do much more. We recognize that a comprehensive and personal solution must encompass each part of your personal and professional wealth including your retirement and other investment accounts, your business or professional practice, your stock options and deferred wages, your real estate, tax planning, college funding, insurances, estate plans ... all of it.

Over time we bring every piece into a comprehensive plan and build an investment strategy to make certain the each part is aligned with and supportive of your goals.

Fiduciary • Independent • Transparent

- Always Fiduciaries. At Clearstone, our experienced and credentialed advisors are required by law to always act in your best interest. We do this without exception.
- Free of Conflicts of Interest. We are independent. This means that we never try to sell proprietary investment mutual funds, ETFs, or other products. In fact, we don't even have them. Instead, we are able to build your portfolio from thousands of investment options.
- Fee-Only & Transparent. We have never earned a commission or received payments from third-parties for our investment advice. And we never will. Instead, our fees are simple, readily explained, and transparent.