Providing Clear Objective Financial Advice to Families & Business Owners

Why Choose Clear Advice Financial?

The answer is simple. We simplify the complex. In today's complex world of changing tax laws, unlimited investment options, complicated insurance policies, complex estate plans and more, we are extremely passionate about helping our clients simplify their lives. We achieve this by helping our clients organize their finances through their Family Financial Roadmap™.

Our Services

Financial Planning

Through our proprietary financial planning process, we help clients organize, analyze and report on their entire financial life, empowering them to have greater impact on their financial and investment decision-making.

our clients with well-diversified, low-cost and tax-efficient investment portfolios to help them achieve their goals.

Insurance Planning

Using a variety of strategic partnerships, we advise clients on how to manage and mitigate risk including life, disability and long-term care insurance, as well as property and casualty insurance.

The Family Financial Roadmap™

Our unique financial planning process is designed to help clients organize, coordinate and report on their family's finances with ease. Through our custom designed financial roadmap approach, we provide clients with a clear path to achieving their goals, allowing them to enjoy all life has to offer while maintaining controls to achieve true financial fulfillment.

Check It Out! – Download the key to your Family Financial Roadmap™

Download Now

Our Team

Eric Donner, CExP™, ChFC®, CAP®, CLU® President & CEO
Alison Tanner, CFA Director of CFO Services
Bentlee Birchansky, Administrative Coordinator
Khala Watson, Client Services Associate
Alisa Knafelc, Client Services Associate
Robin Donner, Certified Emergenetics Coach

Investment Committee

Aaron Gilman, CFA, CFP®
Peter Nunley, CFA
William E. Hamm, Jr., CFA, ChFC, CFP®, CLU

Our Partner

INDEPENDENT [FINANCIAL] PARTNERS®

Independent Financial Partners (IFP) is a full-service financial advisor support firm. Financial advisory firms like Clear Advice Financial are their customers, where IFP provides a wide array of solutions and services for their business needs, allowing them to focus on their clients.

If you prefer industry lingo, IFP is a Registered Investment Advisor (RIA) for its Investment Adviser Representatives (IARs). IFP partners with financial institutions including Schwab, Fidelity, TD

Contact Us

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products and services that may not truly serve their financial needs, wants and desires".

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Offices in Boca Raton, FL and Tampa, FL

We are located in Palm Beach County, Florida with a heavy concentration of clients in New York.

FINRA BrokerCheck: Check the background of investment professionals associated with this site on FINRA's BrokerCheck.