CLEAR VIEW WEALTH ADVISORS, LLC
Plan Well. Invest Smart. Live Better.

Your *WealthCare* Tune-Up

Are You and Your Family On Track for a Secure Future?

The first step to building wealth and a life with less stress and fewer worries is getting control over your financial situation today.

Your *WealthCare* Tune-Up is similar to your annual medical check-up or car tune up.

We'll look under the hood at every aspect of your finances using our ***WealthCare* 13 Point Checklist**. We'll identify strengths and offer you ways to build on those strengths while protecting yourself from the risks of your particular situation (and there are ALWAYS risks).

For a **low, flat fee** you will get a complete "bumper- to- bumper" review and tune up of your current financial situation, answers to your questions, an understanding of the financial tools you already have and ideas on what your next steps might be.

WHAT YOU GET

- 2 ½ o 3 hour session with your personal Money Coach and CERTIFIED FINANCIAL PLANNER™ professional.
- A complete review of your current financial situation.
- Answers to your most pressing financial questions.
- Notes and On-Going Support
- Access to our web-based modeling and planning software.

We created **Your *WealthCare* Tune-Up** to provide you with access to the knowledge, experience and unbiased perspective of a CERTIFIED FINANCIAL PLANNER™ Professional - but at a reasonable cost and with no sales pitches, obligations or strings attached.

BENEFITS

When our meeting is over you will:

- Understand the basic elements of your personal financial situation including an understanding of each financial product you currently have.
- KNOW what you must do to achieve the things in life that are most important to you.
- Sleep better at night with less stress and fewer worries about money.

For many people, a ***WealthCare* Tune-Up** is all that is needed each year to stay on track financially. Many folks don't need monthly meetings, an expensive leather binder or sales calls from someone every quarter.

You just need **a trusted advisor** (not a financial salesperson) to make sure everything is OK and to be available should something come up when you do need help.

WEALTHCARE TUNE-UP

A complete review of your Financial Health

So you will KNOW that you are on track to a Secure Future for your Family

LOCATION –
Our Offices or Online

FEE: ***$750***
(all inclusive - no surprises)
Includes On Going Support

THE HELP YOU NEED FROM A QUALIFIED EXPERT and 5-STAR ADVISOR

Your *WealthCare* Tune-Up will be done by Steve Stanganelli, CFP®.

Steve is an independent CERTIFIED FINANCIAL PLANNER™ professional who has been providing financial advice for more than 20 years. He is a Five Star Advisor rated by the Paladin Registry, an independent rating service. Steve's 6-Step Process blends the best of financial planning with personal financial knowledge and practical expertise.

This is a fee-only engagement.

It is not a sales pitch - We simply want to provide you with the tools you need to get control over your money ... at a reasonable cost.

Ask about our 100% Satisfaction Money-Back Guarantee!

The *WealthCare* Tune-Up includes **free** access to our **web-based** financial modeling and planning software for 30 days as well as limited ongoing phone and email support through the year.

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WealthCare Tune-Up

Frequently Asked Questions

What Do I Need to Bring to the Meeting?

There are a number of documents you will need to gather and information that needs to be collected and entered into our secure, web-based financial planning software before our meeting. You will receive a letter explaining all the details. Expect to spend a couple hours getting your financial information together and organized.

Why Do You Charge a Fee? Why Not For Free?

We realize many investment firms will provide you with a “free” first meeting to get you to come in. Some may even offer a “free” financial plan which really only focuses on your investments. But then you have to wonder: “What do I have to buy? What products are they going to try to sell me? How are they getting paid for this?”

As in all professions or industries, you “get what you pay for” in the world of finance.

We offer practical advice at a fair price with an **unconditional guarantee:** If you are not completely satisfied with the value that you receive … we will refund your fee completely.

What Are You Going to Try to Sell Me?

Absolutely nothing. The purpose of this meeting is to accomplish a complete review of your current financial situation. We will also answer as many of your questions as we can in the two hours AND leave you with some financial planning tools you can use to get control over your money before it takes control of your life.

Information on Your Boston Money Coach – Steve Stanganelli, CFP®, CRPC®

Steve is a CERTIFIED FINANCIAL PLANNER™ professional and fiduciary advisor with Clear View Wealth Advisors - an independent Registered Investment Advisory firm not affiliated with any Insurer, Broker/Dealer or Wirehouse. Steve has been helping clients make smarter money choices since 1999 as a financial advisor and as a banker before that.