



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

Steven J. Stanganelli, CFP®, CRPC®, AEP®
CERTIFIED FINANCIAL PLANNER™ Professional
CHARTERED RETIREMENT PLANNING COUNSELOR®
ACCREDITED ESTATE PLANNER®
NAPFA-Registered Financial Advisor

How I Use Riskalyze to Serve YOU

Riskalyze is **cutting edge technology** that pinpoints your acceptable levels of risk and reward with **unparalleled accuracy**.

Riskalyze helps me ensure that your portfolio aligns with YOUR investment goals and expectations.

Together we can **take the guesswork out of your financial future**.



Clear View Wealth Advisors, LLC
Mailing Address: 12 Amidon Avenue, Amesbury, MA 01913
Meeting Locations:
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A Registered Investment Adviser

How Does Riskalyze Work?

Capture Your Risk Number

The first step is to take a 5 minute quiz that covers topics such as portfolio size, top financial goals, and what you're willing to risk for potential gains. Then we'll pinpoint your exact Risk Number to guide our decision making process.



Align Your Portfolio

After pinpointing your Risk Number, we'll craft a portfolio that aligns with your personal preferences and priorities, allowing you to feel comfortable with your expected outcomes.

The resulting proposed portfolio will include projections for the potential gains and losses we should expect over time.

Meet Your Retirement Goals

Before we're finished, we'll also review your progress toward your financial goals by building a Retirement Map. When you're done, you'll fully understand the probabilities of success, and what we need to do to increase it.



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