

Keith Jacoby, CFP, CIMA, CEO & Partner

The reason Clarity Wealth exists at its highest level is to create three things for all the clients and families that we serve. Number one is clarity. Number two, confidence. And number three is structure. Clarity to us is having a full and complete understanding of everything that's going on in your financial life. When you get something organized, it could be something as big as a garage or as small as this center console in your car or a junk drawer, something happens that frees up space in our brain that allows us to think more creatively and confidently about the future. So clarity is having a full and complete understanding of where we are today by having that space organized, by having that plan organized. That's where we achieve this confidence.

Scott Metzger, Managing Director, PIM Portfolio Manager

I think what confidence means the clients is having a trusted advisor with a supportive team, a process in place, freeing them up to grow personally, to truly live their dreams. Confidence is a word, but to me it's an emotion. It just provides them freedom and peace of mind.

Keith Jacoby, CFP, CIMA, CEO & Partner

Finding that balance so that we're living our best lives today, but also knowing that it's a sustainable endeavor that allows for unexpected events in the future, unexpected opportunities in the future, and a legacy for our loved ones.

Kevin Wolf, Managing Director, PIM Portfolio Manager

Especially when you're retired, you're concerned about running out of money or what we're going to pass on to the kids. And so, you know, our goal is to, you know, simplify things. Take this complicated situation so they clearly understand what they own, why they own it, and also where the risks are.

Keith Jacoby, CFP, CIMA, CEO & Partner

So periodically and regularly, we proactively reach out to carve out time on people's schedules to do a full and complete review through this structured process. And the goal in those review meetings in that structure is simple. We want to renew that sense of clarity and confidence that the family has.

Kurt Maurillo, CFP, Managing Director, PIM Portfolio Manager

So it is nice to have a full realm and a full team of service professionals that have been doing this for a long time with over 900 years of experience. I think 900 years – wow, it's a lot, right? And there's 40 plus individuals with designations from a CFP to charter financial consultants around the board. So when you bring that to the table, I think it's very unique that you're able to have access to all of that with the dial of one phone number. I guarantee you today the service level you're going to receive from us is phenomenal. You know, we're going to make sure that we're proactive working with you so if something does happen, you're ready for it.

Dan Lampe, President & Partner

What we're working towards is a team approach, you know, focused around people's unique skills and using those unique skills to work with our clients, work with their families. One of the things that we really done at Clarity Wealth is focus on building out our client advice teams. The heart of who we are and what we try to do. From working with our team members here to serving our clients, we take it very seriously, and we didn't sit down and say this is an aspirational goal. We want to be these values. We sat down and said, "What are our core values? What do people feel? What do they see when they walk through the door?" And the first thing that came to mind was, we care. We truly do care about our clients. We care about the experience they have. We care about their families, we care about their goals. And sometimes it keeps us up at night, we care so much, but we truly care about each other and our clients that we serve.

Don Nealon, Partner

At Clarity Wealth, we pride ourselves in going the extra mile. We talk about it all the time, and that's part of what our proposition is when we look for new hires, when we look for people, we're always going to have somebody that's got a history of going the extra mile. Everybody knows that you are going to get a top-drawer type of experience.

Keith Jacoby, CFP, CIMA, CEO & Partner

It's being able to support your passions, the people you love, the people you care for, the charities you're interested in, knowing that if a legacy to future generations is important to you, that is in there.

Laura Ross, CFP, Senior Vice President, Wealth Advisor

This is an ongoing relationship. We want to be the last advisor that your family ever has. So we want to, you know, make sure that we're doing things right. At the end of the day, our core focus is to help clients succeed and live their best life.