Clarity Wealth Helps Families Preserve Wealth for Future Generations

By Keith Jacoby CFP®, CIMA®

Focusing on families

Financial security is important to everyone, regardless of their income or net worth. We all work hard to hopefully build a healthy nest egg that one day we can pass down to our children and grandchildren.

Without the right direction, though, many individuals and couples – even those with successful careers – might fall short of their financial goals.

One of Clarity Wealth's focuses is on our Family Wealth Council™, a proprietary approach to working with families to transition knowledge along with wealth from generation to generation. This means not only knowing the family's wealth, but how they created it, the sacrifices the early generations made, and helping pass on that knowledge to future generations. We have learned this knowledge is what helps create the legacy our clients want, not just financial security for generations to come.

Our approach to your legacy

Clarity Wealth assembles teams, rather than individuals, to work with families. Because we are an extension of their family, we have a vested interest in their lives, and ultimately their financial success. We look at the entire picture – who is important in their lives, what activities do they enjoy, as well as how their assets are performing. To help them succeed and live the life they want to live and have earned. A big picture approach, rather than an individual approach, puts families' goals within reach.

The Clarity Wealth team lives by four core values that fuel the firm's energy and culture, principles that apply to any type of business:

- **We care.** We care about each other, the families we serve and the importance of our work.
- **We take ownership.** We are self-starters, know our role and own it.
- **We do things right.** We are process driven. We think things through from the client's perspective to make it as easy and efficient as possible.
- **We go the extra mile.** We strive to deliver five-star attention and service.

At Clarity Wealth, our passion is to help clients live the life they want today and leave the legacy they want for future generations.

About the Author

Keith Jacoby, CFP®, CIMA®, is CEO of Clarity Wealth, a financial services firm that has built a heritage of managing the assets of affluent families for as many as four generations of wealth. The firm has offices in Naples and Fort Myers, Florida, and Pittsburgh, Pennsylvania.
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