CLEAR RIDGE
WEALTH MANAGEMENT

Clear Ridge

Wealth Management for Families and Institutions

Our Experience

Over twenty-five years of financial advisory experience.

Independently-owned, Registered Investment Advisor

Fiduciary, Fee-only

Independent member of the Focus Partners Advisor Solutions community since 2014.

Your Experience

Transparent fees

Work directly with firm owners, personal service

Customized financial planning and investment management

Estate plan design assistance and funding

Collaboration with other professional advisors

BEHIND THE NUMBERS

Investments based on Modern Portfolio Theory — evidence-based approach

Primary investments used are Dimensional Fund Advisors (DFA) funds

Tilt toward value and small cap, based on historical outperformance