

CLEARWATER REVIEW



**CLEAR
LEGACY**

**A CLEAR VIEW OF
YOUR FINANCIAL FUTURE.**

**CLEAR TAX
STRATEGY**

A CLEAR VIEW OF YOUR TAX EFFICIENCY
• ENSURING YOUR ASSETS ARE ALLOCATED
AND DISTRIBUTED PROPERLY

**CLEAR FINANCIAL
REVIEW**

**A CLEAR REVIEW OF
YOUR FINANCIAL STRATEGY**

CLEAR INCOME PLAN

**A CLEAR VIEW TO BUILDING A
RETIREMENT INCOME PLAN
(INCOME, EXPENSES, LIFE-
STYLE CHANGES, TAXES, ETC.)**

Investment advisory services offered only by duly registered individuals through AE Wealth Management, LLC (AEWM). AEWM and Bluewater Financial, LLC are not affiliated companies. AW07173341

A TRUE TEAM APPROACH