Clear Direction
INVESTMENTS
PEOPLE FIRST, FINANCES SECOND

GET TO KNOW US

Welcome To Our Company

The Message From Our CEO, Randy Stoltz

Let's Navigate Asset Management Strategies Together

Remember, asset management isn't one-size-fits-all. It should be a personalized service that evolves with your life and the markets. At Clear Direction Investments, we take pride in our client-centric approach, combining deep market insights with customized strategies.

ASSET MANAGEMENT REDEFINED

Clear Direction Investments is an Asset Management firm serving high net worth individuals and families, as well as partnerships and corporations with sophisticated investment needs. We are here to provide continuous support throughout your financial journey while taking a human approach beyond the technical; to ensure that your best interests are carried out during these important steps in your life.

Company Introduction

Asset Management Redefined

Company History

After producing Video Brochures to direct selling companies in the early 90s, Randy launched his financial services career in 1998. As an early investment professional, he started brokering life & health insurance. This growing niche expanded into founding Campus Advisers by working with parents of college-bound students. Soon, these household relationships grew into Stoltz Financial Partners' financial planning. As the client base and team continued to grow, this expanded the opportunity set to brand as Clear Direction Investments.

REAL ESTATE ALTERNATIVES

1031 Exchange Delaware Statutory Trust (DST), Qualified Opportunity Zones (QOZ), Private Placement

STOCKS / ETFs / BONDS

Stonebridge Capital Advisors, Institutional Investment Management

TRANSITIONAL WEALTH PLANNING

Business Succession Planning, Strategic Risk Alternatives

Our Services

REAL ESTATE ALTERNATIVES

Real estate investing goes beyond the direct purchase of property; in today's environment, it also encompasses investing in alternative real estate investments. Different from the traditional real estate structure, alternative investments provide a new opportunity for investors to access passive income, diversify their portfolios and often utilize tax mitigation strategies that can potentially help increase overall returns.

Real Estate Alternatives Options

DST 1031 EXCHANGES

A 1031 exchange can be used to swap property in order to defer capital gains taxes and recapture depreciation.

OPPORTUNITY ZONE FUNDS

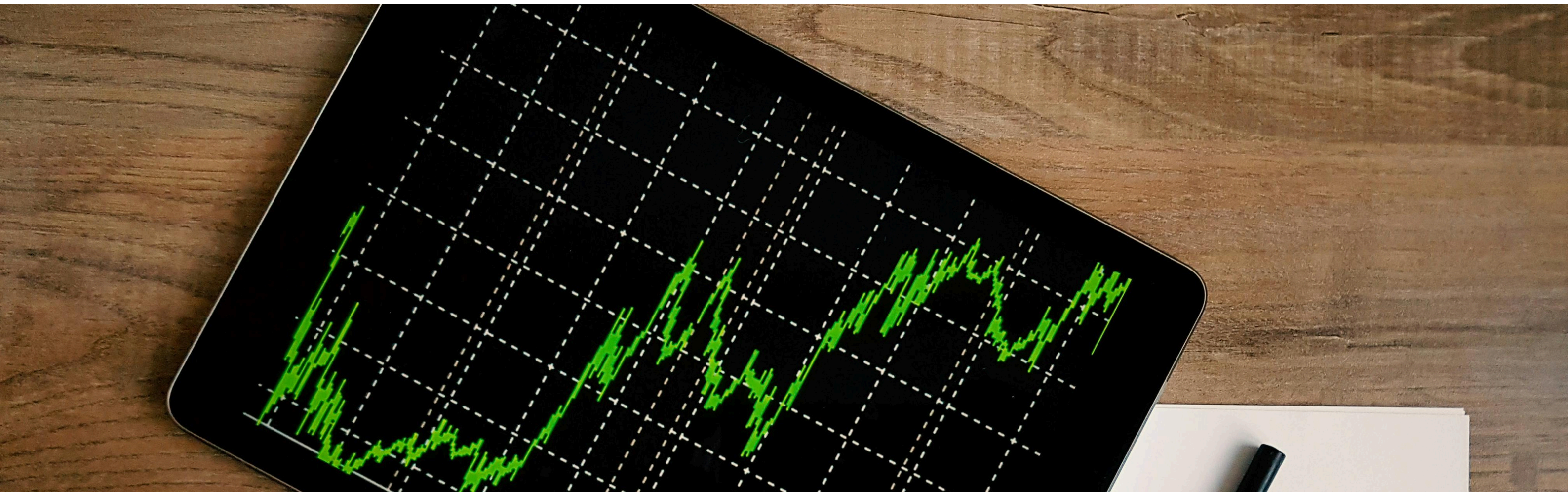
Areas of the U.S., certified by the Treasury and the IRS, which exist for investors to receive preferential tax treatment in exchange for investing long term capital gains into areas designated by the governors of each state.

PRIVATE PARTNERSHIP REAL ESTATE

Senior housing, apartment community upgrades, non-traded Real Estate Investment Trusts, grocery-anchored retail, e-commerce/Industrial warehouse, tax-advantaged energy & drilling programs, & more.

Our Services

STOCKS / ETFs / BONDS



Through our partnership with Stonebridge Capital Advisors, we assist investors in a fiduciary capacity that puts the clients' interests first. Clear Direction guides the Stonebridge team led by John Schonberg CFA, the firm's CIO, to create custom portfolios of equities, bonds, and exchange traded funds (ETFs).

The Clear Direction / Stonebridge partnership provides tailored portfolio management services to high-net-worth individuals and households, including tax sensitive investing not available through mutual funds. Portfolios are managed as tax-advantaged separately managed accounts (SMAs). Clients' assets are custodied at Charles Schwab/TD Ameritrade, Pershing and Fidelity. Stonebridge has its own in-house fixed income and equity teams consisting of individuals with many years of experience as well as high-level credentials.

We believe separately managed accounts (SMAs) offer the client the flexibility to manage taxes within their personal parameters. SMAs are more cost-effective for IRA accounts compared to "wrap accounts" with mutual funds, they are even more tax efficient for non-retirement accounts. For example, since each portfolio owns individual stocks, bonds and ETFs, we have discretion over when capital gains and losses can be realized. Mutual funds cannot do this for investors.

Our Services

TRANSITIONAL WEALTH PLANNING

BUSINESS SUCCESSION PLANNING

We'll make the personal introduction to a business partner to explore the difference between a planning process and a decision-making process to gain the wisdom about your desired outcomes.

STRATEGIC RISK ALTERNATIVES

Through our associates at SRA 831(b) Plan, we help affluent entrepreneurs mitigate risk across the enterprise with the goal of asset protection.

RETIREMENT

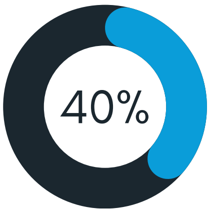
At Clear Direction, we believe that planning is the foundation for any and all subsequent investment recommendations.

Company Value

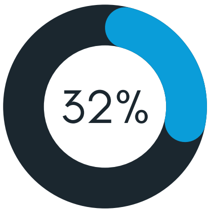
ASSET PRESERVATION

DID YOU KNOW?

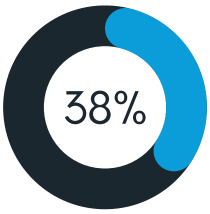
According to a survey by Slack and sourced by Yahoo! Finance:



About 40% of small business owners think 2024 will be a “make or break” year for their business.



32% of respondents are not sure they will make it through 2024.



38% of small business owners said they are more worried about their business as they enter 2024 than they were as 2023 started.

As business owners face a potentially defining year, Clear Direction Investments is here to assist with your investment and success planning endeavors.

Company Value

FINANCE GOALS

HOW DOES ASSET MANAGEMENT BENEFIT INVESTORS?

Asset management is an integral approach that extends beyond mere selection of stocks or real estate. It may align your financial objectives with the opportunities presented by the market.

In-depth Market Insights

With years of experience, firms like Clear Direction Investments offer insights into market trends, facilitating confident decision-making.

Customized Strategies

With years of experience, firms like Clear Direction Investments offer insights into market trends, facilitating confident decision-making.

Continuous Monitoring and Adjustment

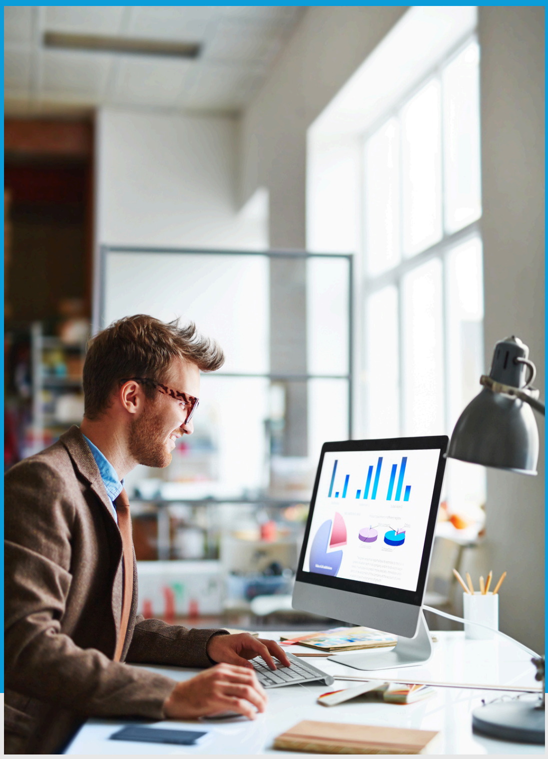
The financial landscape is constantly evolving. An asset manager ensures your investments remain aligned with changing market conditions and personal milestones through ongoing portfolio reviews and adjustments.

Company Value

FINANCIAL PLANNING

Real Estate Alternatives

Exploring the potential of real estate alternatives can be an exciting addition to your investment portfolio. Before you take the plunge, consider these crucial questions:



01. What are Your Investment Objectives?

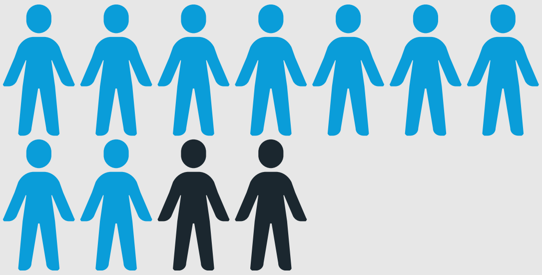
Identify whether your aim is to generate additional income, achieve long-term capital growth, or diversify your portfolio.

02. How does real estate fit into your risk profile?

Real estate investments vary in risk, influenced by market dynamics and specific property factors. Evaluate your willingness to accept these risks and determine if real estate alternatives align with your financial strategy.

03. Do you understand the investment structure?

The landscape of real estate alternatives, including REITs and private equity funds, offers varied investment mechanisms. Engage with an asset manager for detailed insights into each option, ensuring a confident decision.



More Information About Us

ASSET MANAGEMENT REDEFINED

Our "People First" philosophy is rooted in the belief that asset management services should be as much about the people we serve as they are about the portfolios we manage.
Here is how we build in our philosophy into our work:

- Tailored Financial Solutions
- Built Trust and Transparency
- Proactive and Responsive Service
- Commitment to Client Education
- Long-Term Partnerships

We invest in relationships that grow over time, adapting to life's changes with our clients. This approach enhances our service delivery and enriches our understanding of the diverse needs within our client community.

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