CLEAR VIEW WEALTH ADVISORS, LLC

Plan Well. Invest Smart. Live Better.

Steven Stanganelli, MSF, CFP®, CRPC®, AEP®

CERTIFIED FINANCIAL PLANNER ™ Professional
CHARTERED RETIREMENT PLANNING COUNSELOR℠
ACCREDITED ESTATE PLANNER®

EDUCATION

PROFESSIONAL ACCREDIATIONS

& AFFILIATIONS

University of Massachusetts - Lowell:
BA – Economics

Bentley College:
MS – Finance

Beta Gamma Sigma

College for Financial Planning:
CRPC Program

National Association of Personal Financial Advisors

Financial Planning Association

Merrimack Valley Estate Planning Council

National Association of Estate Planners & Councils

"My goal is to help my clients make smarter money moves and be prepared for all of life's transitions. I work with my clients providing them with the compass and road map to help them get where they need to go and where they want to be.

Whether your challenge is minimizing taxes, providing a guaranteed income for retirement or funding college education, I will help you define and achieve your goals using unparalleled resources, proven strategies and conflict-free advice."
– Steve Stanganelli

Steve Stanganelli is a five-star rated, board-certified financial planning professional who has over 20 years of experience coaching individuals and businesses on ways to improve and protect their personal or business bottom line.

Steve has worked with numerous individuals and businesses as a mortgage banker, business owner, business finance consultant and now as a CERTIFIED FINANCIAL PLANNER ™ Professional.

His practice encompasses retirement income planning, investment management, divorce settlement analysis and college funding strategies. He is a published author and regularly presents on these topics to businesses, civic groups and community organizations.

Steve works with a variety of individuals and families with a special focus on Baby Boomer pre-retirees, business owners, corporate executives and medical professionals.

Steve earned his Master of Science degree in Finance (MSF) from Bentley College with high distinction. He is also an honors graduate of the University of Massachusetts – Lowell.

Steve holds the designations of CERTIFIED FINANCIAL PLANNER ™, CHARTERED RETIREMENT PLANNING COUNSELOR ™, ACCREDITED ESTATE PLANNER ®, and two college planning designations (CCFC® and CCFS®) based on testing and/or experience requirements.

Steve is a member and former executive officer of the Greater Merrimack Valley Estate Planning Council. Steve, formerly of Methuen, is a resident of Amesbury where he lives with his wife, Kristin, a Registered Dietitian, and sons, Spencer and Zachary and daughter Sabrina. He is an avid competitive cyclist.

FPA. FINANCIAL PLANNING ASSOCIATION PROUD MEMBER 2010

PROUD CFP® PROFESSIONAL — CERTIFIED FINANCIAL PLANNER™ THE HIGHEST STANDARD

PALADIN REGISTRY FIVE STAR ADVISOR ★★★★★

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