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Transforming Complexity Into Opportunity

Chicago
Financial

Promotion

Total Clarity Wealth Management, Inc.

Life is moving at a faster pace and becoming more and more complicated. "Many of our clients come to us because of the complexities in investment strategies, tax laws, inter-generational planning, charitable giving and so on. That is why we help our clients step back and achieve clarity regarding their current lives as well as their goals and dreams. This focus is the genesis of our company's name," says Terry Murphy, president of Total Clarity Wealth Management, Inc.

Total Clarity was conceived from the shared vision of its advisors, who desired to assist their clients in moving beyond the "how" of financial planning to the "why." The advisors lead their clients through a process of discovery to clearly understand each client's values, vision and goals. Using that information, they and their clients develop specific financial goals, objectives and strategies that are incorporated into an implementation plan. The advisors then continually manage the process and monitor the progress toward achieving these goals and objectives. "By following this proven process, we provide a structure for clients to identify the things that are truly important to them, and then use our expertise in financial planning and investment management to help them address those priorities," Murphy says.

While the planning process described above is important, the execution of the plan is critical to success. Murphy says, "While we have professionals who specialize in financial planning, our core competency is asset management. If we do not execute the investment plan with excellence, then all the other planning was for naught. Our advisors work very hard to implement the plans effectively."



From left: Wayne Walschot, Tom Sleeter, Douglas Glick, Jeanne Tackett, Terry Murphy, Janis Sleeter, Brent Fields

Murphy adds, "Each of our clients is unique, and we develop individualized strategies to help them achieve their goals and limit their risk." That means assisting clients in managing the factors they can control and preparing for the factors they cannot.

The professional experience of the Total Clarity team is as varied as its clients. Their backgrounds include accounting, engineering, law, military intelligence and a former CFO, along with over 100 years of combined experience in finance. These varied backgrounds assist in coordinating strategies with clients' other advisors, including attorneys, accountants, bankers, trustees and other family members. "Since we often work with family businesses and several generations of family members, maintaining clear communications and direction with all parties can be critical," says

Murphy. "Clients appreciate our ability to help them through many of life's major turning points such as retirement, wealth transfer, sale of a business or divorce."

Total Clarity's managed accounts are fee-based, meaning that the fees are a percentage of the assets under management. Compensation is directly tied to the value of the client's accounts regardless of the volume of account activity. "People see that our interests are aligned and we are in the same boat. They like the transparency provided by our fee-based system, and they understand the value they receive in relation to the fees they pay," says Murphy.

He concludes, "The complexity of our modern world does not have to overwhelm us. With clarity of purpose and effective, professional management, anyone has the opportunity to reach their life's potential."



Securities and investment advisory services offered through Financial Network Investment Corporation, member SIPC. Financial Network and Total Clarity are not affiliated.

*If this approach makes sense
to you, please visit
www.totalclaritywealth.com
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