



Asset Management: Your Key to an Individualized Financial Strategy

Our asset management service features a customized investment strategy based on your particular financial situation:

- Assets currently held
- Marital status
- Earnings projections
- Life stage
- Short and long-term needs
- Anticipated inheritance
- Dependents
- Financial obligations
- Risk tolerance
- Goals
- Benefit packages
- Settlements

We apply this knowledge set to market conditions, to develop an investment strategy uniquely tailored for you.

At that point, your assets are powered by the knowledge of the Clayton Financial Services, Inc. Investment Team, who make discretionary adjustments when it is in the best interest of your portfolio. Buy/sell decisions on particular holdings stem from performance reviews and market projections, as well as your individualized objectives as previously established. The investment team takes a “big picture” approach to the market, giving equal weight to the market outlook as a whole, and not just the performance of individual holdings.

As a client enrolled in asset management, you:

- Receive quarterly portfolio summaries that compare how your investments performed compared to other indices with no management fees.
- Have 24-access to online account information.
- Meet with a CFSI planner on a customized frequency.
- Are supplied all necessary forms and reports for tax reporting, loan applications and legal issues.
- Receive unbiased advice.
- Know that our goal is to have your investment portfolio in-step with current market conditions.

Call today to learn more.

(785) 232-3266

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“The investment team takes a ‘big picture’ approach to the market...”

Clayton Financial Services, Inc. has been in business for over 25 years, offering financial planning; money management; tax, estate, and risk planning. Call us today to make an appointment to improve your future: 785-232-3266.