



CLEARSTONE
WEALTH MANAGEMENT

SELF-EMPLOYED

While self-employed professionals, contractors, realtors and freelancers enjoy being independent, they also face a number of challenges. Unlike full-time employees, self-employed professionals and entrepreneurs can have variable and highly fluctuating incomes. Additionally, they may need to fund their own benefits and investments and retirement.

We help self-employed professionals get the most out of their careers, or even “second” careers by first assessing their practice and identifying areas they can reduce taxes and costs. We also review retirement options available to them, including a SEP IRA, Solo 401(k), SIMPLE IRA or some other qualified vehicle. Once the plan has been selected, we help design, create and manage the activity in accordance to your intentions and goals.