



“We’ve seen amazing, successful families crash and burn because the leaders either didn’t think they had to do the hard work of fully planning for the future or had the wrong definition of what successful planning looked like. Clariata is designed to change that.”

– Mark Casella, Founder





Planning for the future doesn't always come easy ... but with Clariata it can.

For families who haven't yet considered what needs to be done in pursuit of what matters most to them, Clariata will provide a clear direction and help bring life decisions into focus.

Thanks to a digitally-assisted strategic planning and implementation toolset, **Clariata brings clarity to life.** The holistic, integrated approach is for clients who are passionate about pursuing success for their families, communities and philanthropic pursuits.

As a professional advisor you will engage and lead families through the 5-D Process designed to deepen the interpersonal relationship and assist them with achieving their dreams.

Clariata: Helping Families Chart Their Course in Life



Guides families and individuals to bring life decisions into focus



Holistic, integrated approach for clients who are passionate about pursuing success



Deeper connections to increase the value of the client/advisor relationship

It's about wanting to
do more for clients
than just building wealth.





Make Deeper Connections

You've seen the gaps in legacy planning tools—they lack personal connection and room for human emotion. But you know that there's an advantage to making a connection ... in fact, studies show that top-rated advisors who connect well with their clients outperform their competitors.*

Establishing deeper relationships leads to better performance:

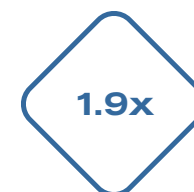


Clariata family advisors assist their clients with a better understanding of:

What's important

What do they want/need

How are they going to make their dreams real



Net New Assets



Higher Fees



More Likely to Be Recommended

*Capgemini World Wealth Report 2019



But this is more than just numbers. This is about turning dreams into destiny.

As a Clariata family advisor, you're passionate about helping families chart their course in life. You not only bring clarity when things feel grey, but you help them navigate through the confusion. You're the compass that they need, their trusted guide they can rely on for counsel.



“An inheritance is what you leave with people. A legacy is what you leave in them.”

– Craig D. Lounsborough

Documents do not substitute for conversations.

Life is more than accumulating wealth. You know that—and so do your clients. When it comes to transferring wealth, it is more about the impact it will have on the family versus the amount. This is why it is valuable to your business to engage the entire family in conversations involved in legacy planning. Help the entire family see the benefit of starting the wealth transfer process now.



69%

of heirs do not have a relationship with their parents' advisor and will change advisors

70%

of wealth transfer results in loss of control of assets and family unity



Clariata is the solution for both preventing this familial disruption and deepening relationships.



70%

of women change advisors once widowed due to lack of involvement with husband's advisor

60%

of wealth transfer failures were attributed to trust and communication issues



Data taken from "Institute for Preparing Heirs" webinar.

The 5-D Process Moving life toward what matters most

The 5-D process is the backbone of Clariata. It provides a structure to better align the advisor/client relationship towards mutual success. You'll have conversations with your client and their families to determine:



DISCOVER *Which values are important to your client?*

Stories of the family journey reveal the events and experiences that have helped shape and form who the family is today. What are the values and beliefs the family has learned from these experiences that are now embraced by the family as the foundation for making purpose-driven decisions?



DREAM *What does success look like?*

Envision what success means in terms of the life one wishes to pursue. What does a well-lived life look like for the family, today and in the future? What do members of the family like to do individually and collectively? How does the family want to make a difference in the lives of the people they care about? What of the family's values do they want to pass on to others as a means for helping them to find their own path to success?



DIRECTION *What do we need to do together to achieve success?*

Bring order and logic to what needs to be done to pursue what is most important. How will the family achieve their priorities? What needs to be done to make dreams real? As each priority is curated, a strategic plan is developed to help the family reach their goals.



DEEPEN *What tools will you use to help your client?*

The key to retaining long-term client relationships is to build a deep personal connection. Attention is turned to the details of what needs to be done and a personalized, proactive and priorities-driven action plan is developed. Milestones for each action step are established to measure progress. The result? Deeper, more trusted relationships are established between client and advisor.



DESTINY *Where do we go from here?*

What does the family need to do to ensure their family capital will be a resource for generations to come? Provide the family with a set of tools and activities to use in perpetuating their legacy and for those who are thinking multi-generationally about their future.



“The people I wanted to talk to weren’t interested in investing in the stock market ... they were busy attending to their family enterprises. This is what they were invested in. This was their livelihood; it defined them. This was something they *did* want to talk about.”

– Mark Casella, Living a Legacy That Lasts

The Clariata Platform

A LifeMap for the Future

As an advisor, you have the power of Clariata to help bring life decisions into focus for your clients and their families. The holistic, integrated LifeMapping process leads to a deeper connection between the client and advisor. This strengthened relationship will foster something meaningful for their future.



Brings life into focus

- Learn more about your client and guide them through the grey
- Curate the information needed to make the best decisions

Digital platform fills the technology gap

- Produce a life strategy tailored to a client's needs and circumstances
- Organize, prioritize and formulate what needs to be done

Better results

- Do this well and get better financial results and improved performance ... your success is their success
- Allocate resources to maximize their value





Advisor consulting to support you in your strategy, approach and engagement with clients



Digital LifeMapping platform to help advisors guide high net worth families

Bring Clariata to your clients and receive:



Training + coaching for high utilization and how to get the most from the Clariata approach



Technology support providing customization and integration for platform users



“Your power to choose your direction of your life allows you to reinvent yourself, to change your future and to powerfully influence the rest of creation.”

– *Stephen R. Covey*



Help bring life decisions **into focus** for your clients and their families with Clariata.

Their dreams bring out *your* best.

A decade into Clariata founder Mark Casella's career in the world of investing, he began to notice that the more money his clients had, the less they wanted to talk about investing. It seemed his wealthiest clients were more interested in the success of their families, their communities or their philanthropic pursuits—money seemed unimportant to them. Mark wanted to help them—but how?

He knew it was time for a change.

Mark saw that families needed a solution different from what other professional service providers offered. He took what Harvard professors Laura Nash and Howard Stevenson said to heart: Success was much more than winning or being famous—but rather it should be measured in terms of quality of life along the metrics of happiness, achievement, significance and legacy.

To nurture a multi-generational family legacy takes work. It's a process that focuses on purpose and vision, as well as open communication from everyone in the family. It's nurtured in a spirit of trust and a willingness to be vulnerable in sharing what matters most. And, as Mark learned, it happens when everyone has the tools and education they need to be positioned and prepared for the future.



Mark left his Wall Street career to start Coppertree in 2005 so he could help families pursue what really mattered to them. At Coppertree, Mark created a process based on his philosophy that his clients needed to focus on more than just their money to reach places they only imagined were possible. He created Clariata with this in mind. Clariata gives advisors this same ability to help families use all they have to get what they want.



Mark Casella
Clariata Founder

**Make their
dreams
come true.**

Contact us

Cincinnati Office
1101 St. Gregory St. #225
Cincinnati, OH 45202
513.460.2753

Virginia Office
5853 Highland Road
Dublin, VA 24084
937.830.0938





clariata.com