

Do You Want To Check Every Box?

DIY Financial Advisor Comparison/Decision Tool Use this checklist as a tool to help you compare the benefits of Camarda to other advisors:		
Benefit You May be Searching For:	Camarda Wealth	Other Advisor(s) <i>(Check those that apply)</i>
FULL-TIME fiduciary – no commissions or hidden compensation	✓	
Full-Service Financial Planning Programs (<i>estate, asset protection, tax, & more</i>)	✓	
Tax prep & estate/trust/asset protection documents, in-house ⁸	✓	
Wealth management systems designed by award-winning ¹ Ph.D.	✓	
Wealth leaders include lifelong award-winning Ph.D. researcher, educator, and writer	✓	
Investments directed by Portfolio Management Board Ph.D./CFA®s/CFP®s/CMT®/CIMA®/CPWA® & more Combined experience of 100 years+	✓	
One-stop comprehensive wealth management team	✓	
Fee-only/no commission portfolio management	✓	
Active risk-managed investments trading	✓	
Customized individual portfolio planning	✓	
Dedicated Personal Wealth Advisor who knows & calls you	✓	
Can manage 401(k)s without transferring	✓	
Can keep & manage existing investments	✓	
Scheduled ongoing updates & service	✓	
Repeated long-term national recognition	✓	
Expert tax, asset protection, estate advice & more	✓	
Comprehensive retirement planning & income planning	✓	
Advice on real estate, businesses & more	✓	
Robust staff, long term succession plan	✓	