

Preserving Your Family's Financial Future for Generations to Come



CICCARELLI
ADVISORY SERVICES, INC.
Family Focused Wealth Management



Sustainable Wealth-Preservation Strategy

Ciccarelli Advisory Services focuses on what is important to families because we are a family-owned and -operated wealth management and financial planning firm. Our clients benefit not only from comprehensive financial expertise and guidance, but also from an experienced team that knows how to deal with complex family dynamics and how they can affect the wealth-management process.

For more than 30 years, CAS has been helping family generations focus on what matters to them by developing a Plan for a Lifetime. Our holistic approach helps clients define their unique family mission and shape a sustainable wealth-preservation strategy.

Family Focused Wealth Management



Your Unique Family Needs

Your family's financial needs are as unique as your family. As an independent advisory firm, our number one priority is developing a financial plan that will fulfill your personal goals and vision for the future. Our independence means we have no vested interest in any particular products, allowing us to help your family choose the right products for you.

Before we provide you with financial advice and guidance, we get to know you first. By establishing a personal relationship with you and your family, we help you design a comprehensive plan that reflects where you and your family are today and where you want to be tomorrow.

www.casmoneymatters.com



Planning for a Lifetime

Successfully managing your family's finances depends on a well-thought-out and executed plan, as well as working with a professional team of financial advisors to support your efforts. Our experienced family of financial advisors work with you to develop your plan and manage your family's financial future.

We focus on providing you with proactive guidance and unparalleled service, delivering personalized financial solutions that fulfill your family's needs. Starting with your family mission, we incorporate your values to shape a sustainable wealth preservation strategy, paying particular attention to your most important goals and helping you plan for all of life's transitions.

Family Focused Wealth Management



Family Across All Generations

Your legacy encompasses more than simply transferring assets to your loved ones. Your CAS family cares about the financial future of your entire family. We help you clarify the things that matter most to you, help you stay on track, and coordinate a plan that will continue to work for you and your family for generations to come.

Our holistic approach empowers you to educate your loved ones about how to handle your money properly and profitably. Because we are a family-owned and -operated firm, we use this experience to facilitate communication between family members and help you realize your most important goals.

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Working with Your CAS Family of Advisors

At CAS, the foundation of our business is family. Founded in 1983 by brother and sister Ray and Kim Ciccarelli, they unite a seven-member Board of Directors, an experienced associate planner team, and a group of support staff around one common goal: guiding you and your family towards your financial goals, and empowering you to focus on your priorities.

Our family advocates for your family's continued success and prosperity; today, tomorrow, and for generations to come. Contact a family advisor today to discover how CAS can help you have trust and confidence in your financial future.

NAPLES

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Discover How Our Family Can Help Your Family Plan for a Lifetime

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