

## **Financial Advisor in Winchester, John R. Clawson, MBA, CFP®**

### Age Requirements

18 and over

### Family

No

### Intake Contact

John Clawson

### Intake Contact Email

jrclawson@wradvisors.com

### Intake Process

Call the office for information and to schedule an appointment

### Self Refer

Yes

Waddell and Reed, Inc.

<http://www.waddell.com/>

<http://www.johnclawson.wrfa.com/>

### Main

(540) 662-4642

### Waddell & Reed

440 W Jubal Early Drive, Suite 220

22601 VA

United States

### Fee Structure

#### Fee Range

#### Payment Method(s)

Private Pay

#### Languages Spoken

English

Services cover all areas of financial management, from investment and retirement planning to risk management and estate planning. Staff seeks to help you develop a

comprehensive, cohesive financial strategy that fits your needs. Planning solutions take into account the totality of your financial situation as well as your dreams and aspiration.

The staff will help clients take advantage of opportunities by providing them with three key tools:

1. A clear understanding of their financial goals.
2. A well-defined roadmap to help achieve those goals.
3. Ongoing advice to help adjust their roadmap when their needs change.

For a complimentary, no obligation financial review by telephone or in person, please call us at (540) 662-4642, to set up an appointment.

” Securities and Investment Advisory Services offered through Waddell & Reed, Inc., a Broker/Dealer, Member FINRA/SIPC and Federally Registered Investment Advisor. Insurance products offered through insurance companies with which Waddell & Reed has sales arrangements. ”

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Service Area(s)

Clarke County

,

Frederick County

,

Page County

,

Shenandoah County

,

Warren County

,

Winchester City