



FOR IMMEDIATE RELEASE

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Cleary Gull Rolls Out New Asset Management Program
ClearWealth® Pre-Retirement Program Helps Pilots Prepare for Retirement

Milwaukee, WI – April 7, 2014 – Cleary Gull Inc. announced a new pre-retirement planning program specifically designed for airline pilots and their 401(k) plans with a brokerage window.

Pilot retirement plans have changed significantly since the financial crisis due to airline restructuring, mergers and bankruptcies; requiring pilots to take more control and have more responsibility for preparing for their retirement. Cleary Gull’s ClearWealth® Pre-Retirement Program allows pilots to work with an outside advisor to have a professionally managed portfolio within their 401(k) retirement plan via their retirement plan’s brokerage window.

A recent survey conducted by Cleary Gull revealed that nearly a quarter (24%) of the pilots that participated in the survey already work with an advisor and 64% aspire to work with an advisor to help meet retirement goals. Many retirement plans designed for pilots offer a brokerage window. The survey also indicated that the majority of pilots that participated in the survey (60%) use the brokerage window which allows them to invest in individual stocks, as well as mutual funds that are not included in their plan’s investment line up.

“Most pilots now have to work longer and save more in order to reach their retirement goals,” said Bob Warner, managing director and leader of the pilot retirement practice at Cleary Gull. “Many are seeking outside guidance to help them with the complexity and fully utilizing the brokerage window to maximize asset class diversification, integrate the highest quality funds into their portfolio, and potentially augment their retirement accumulation and income goals.”

Establishing a ClearWealth® Pre-Retirement Program requires three simple steps: an online application to set up the paperwork, signing and returning the completed paperwork, and then working closely with a Cleary Gull advisor to set up a pre-retirement financial plan.

Warner continues, “Taking advantage of the brokerage window can give pilots more options and more control. The more investment choices your retirement plan offers, the more advantages you have when building your strategy and plan. For this reason we encourage pilots, to take full advantage of the brokerage window in their plan.”

About Cleary Gull

Cleary Gull (www.clearygull.com) is an employee-owned firm headquartered in Milwaukee, Wisconsin providing specialized financial services through two operating divisions: Investment Management Services and Investment Banking. Cleary Gull is a leading registered investment advisor guiding client assets totaling \$2.5 billion as of December 31, 2013, with a focus on high net worth individuals, pilots and health care organizations and a leading middle market investment bank, providing advice on exclusive sales, mergers, acquisitions and placing private



placement debt and equity capital, typically involved transactions from \$10 million to \$200 million.

Certain statements made in this press release referring to pilots were based solely on the results of the Cleary Gull survey and should not be construed as attributable to all pilots in the airline industry. The survey was not randomly selected, the sample size may not be large enough to produce a statistically meaningful conclusion, and the survey was not designed or intended to reveal conclusions about airline pilots in general. The survey was mailed to 4,500 airline pilots that have a 401(k) full brokerage window, and none of which are clients of Cleary Gull. Of these pilots, 182 completed the survey.

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