

GUIDING THE WAY TO YOUR FINANCIAL GOALS.

Clear Path is a financial services firm designed to help protect and grow the wealth of our clients. We aim to provide our clients with the freedom and financial peace of mind that comes from knowing they are financially secure. We accomplish this by uncovering the many complexities found in our clients' worlds, and integrating those within a dynamic, solution-driven strategy, designed to help achieve their individual goals.

Leveraging our industry experience in an evolving environment, we help our clients define their short and long term goals through employing a comprehensive, relationship-focused approach.

Our team brings insight to the long-term planning strategies of our clients.

Our services include

- Comprehensive Insurance Strategies
- Wealth Accumulation Strategies
- Retirement Income Strategies
- Financial Management Oversight
- Executive Benefits
- Group Benefits Services



MEET OUR TEAM



Jason Goldstein, ASA, MAAA, RICP®
Co-Founder and
Managing Director,
Financial Strategies



Brandon Levithan, CFP®, ChFC®, RICP®
Co-Founder and
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Kyle M. Dunn, MBA
Director, Financial Strategies



Rick Tremblay
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Robert Touzeau
Financial Services Professional,
SpecialCare Planner



Tricia Koch
Client Services Manager,
Registered Representative



Ryan Visniski, CFA
Financial Planner



Mike Shevlin
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Professional



Julia Zhai, PhD, E, CFP®
Financial Advisor



Sean O'Rourke
Financial Advisor