CARSON WEALTH

There's a better way to manage your wealth.

Short on time and overwhelmed by the amount of "tips and tricks"—how do you confidently discern what's best for your money?

- **Am I paying too much in taxes?**
- **Where can I find better private investments?**
- **What's the best way to protect my wealth for my family?**

Carson Private Client helps you sort through the noise. We'll bring you the ideas and advice you need so you can focus your time on other things.

Wealth Management Designed For You

You need a financial partner who has your best interests in mind and can create a curated strategy to expand your wealth.

We don't replace your current team—we bring them together.

Carson Private Client collaborates with your CPA, attorney, and other professionals to bring you strategic planning and advice—tailored specifically to your unique situation—to ensure your money is working its hardest.

How we work towards your investment goals:

Custom Portfolio Construction

Built for you with purpose and tailor-made with your goals, objectives, and aspirations in mind. We work together to create your own portfolio of public, private, and real estate investments.

Diversified and Disciplined

Balance risk and reward within a coordinated allocation comprised of core, satellite, tactical, and alternative investments. We do this through individual stocks, exchange traded funds (ETFs), real estate investments, fixed income, and alternatives.

After-Tax Return

Keep gains in your pocket with tax-conscious rebalancing and tax loss harvesting. Utilize direct indexing with individual stocks to provide control over taxable gains.

Alternatives

Access to global private company equity, debt, and real assets. Expand your growth and income potential outside of public market exposure.

#24

FA RIA in 2021*

2021

Barron's Top 100 Independent Financial Advisors**

#12

RIA Firm in U.S. ***

*Financial Advisor Magazine's Fastest Growing Firm awarded to Carson Wealth (2019). RIA ranking candidates are ranked by AUM of the previous year. To be eligible for the FA Magazine RIA ranking, firms must be independent registered investment advisors and file their own ADV statement with the SEC. They need to provide financial planning and related services to individual clients. Firms were measured and ranked by their growth in assets under management from 2017 to 2018 to determine the top 50 fastest growing

**Barron's Top 100 Independent Financial Advisors: Awarded to Paul West (2018-2021). Over 4,000 advisors who wish to be ranked fill out a 102-question survey about their practice, data is then applied to a ranking formula. The ranking reflects the volume of assets overseen by the advisors and their teams, revenues generated for the firms, and the quality of the advisors' practices. The scoring system assigns a top score of 100 and rates the rest by comparing them with the top-ranked advisor. Listing in this publication and/or award is not a guarantee of future investment success. This recognition should not be construed as an endorsement of the advisor by any client.

***Barron's Top RIA Firms: Awarded to Carson Group (2021) Barron's rankings are based on data provided by over 4,000 of the nation's most productive advisors. Factors included in the rankings: assets under management, revenue produced for the firm, regulatory record, quality of practice and philanthropic work. Listing in this publication is not a guarantee of future investment success. This recognition should not be construed as an endorsement of the advisor by any client.

Investment advisory services offered through CWM, LLC, an SEC Registered Investment Advisor. Carson Partners, a division of CWM, LLC, is a nationwide partnership of advisors. Some alternative investments involve a high degree of risk, and returns can be volatile. Investing in an alternative investment may only be suitable for persons who are able to assume the risk of losing a portion or all of their entire investment. This brochure is not intended to provide specific legal, tax or other professional advice. For a comprehensive review of your personal situation, always consult with a tax or legal advisor.

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