



RON CARSON, CFP®, CHFC®

Founder and CEO



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Ron Carson is Founder and CEO of the Carson Group, which serves financial advisors and investors through its businesses including [Peak Advisor Alliance](#), [Carson Institutional Alliance](#) and [Carson Wealth](#). Founded in 1983, Peak Advisor Alliance empowers advisors to overcome key business challenges with personalized coaching, proven content and a passionate community. Carson Institutional Alliance empowers advisors to improve client service, efficiently run their practice, grow their business and build a legacy through our turnkey integrated partnership. Through our partnership tools, resources and services, advisors provide their clients with an enhanced level of service and communication. Carson Wealth is one of the top wealth management firms in the country. Since 1983, Carson Wealth offers portfolio management and wealth planning services to high net-worth clients. All three organizations are headquartered in Omaha, Nebraska but serve a broad base of advisors and investors across the country.

Ron first began honing his core principles while working from his dorm room at the University of Nebraska in 1983: a tenacious focus on serving clients' best interests; a relentless pursuit of excellence across every activity; and a burning desire to learn, grow intellectually and innovate. These driving principles enabled the Carson Group to grow to over \$6.6 billion in assets under advisement, which includes assets under management,* and have led Ron to receive countless accolades. He is continually ranked among the top advisors by Barron's magazine and was one of only two independent advisors inducted into Barron's inaugural Hall of Fame. Most recently Ron was named to Forbe's list of America's top wealth advisors, coming in at number 13 out of thousands of advisors. He was also LPL Financial's top-ranked registered representative for 25 consecutive years¹.

He is one of the most celebrated and respected financial advisors and executives in the industry — and is a sought after speaker, thinker and investment strategist. In the spring of 2012, Ron continued to expand his industry leadership by co-founding aRIA. aRIA is a "think-tank" study group comprised of six upstanding RIA firms and Advisor Growth Strategies, a consulting firm serving the wealth management industry. The group offers insight for advisors considering ways to enhance their firms' enterprise values. aRIA meets regularly, releasing thought leadership pieces directed toward independent and wirehouse advisors interested in exploring long-term growth strategies. As a member of the Financial Advisor Council of CNBC, Ron also writes guest columns and provides insight and frontline perspective to the CNBC Digital news team. In 2014, Ron joined The American College of Financial Services board of trustees for a three year term. The College offers turnkey programs that produce effective advisors who are able to join a team and make an impact immediately, helping the industry by adding capacity and building our next generation of advisors. Ron's academic credentials include being a CERTIFIED FINANCIAL PLANNER®, Certified Fund Specialist and a Chartered Financial Consultant. He holds Series 7, 24, 63 licenses through LPL Financial and Series 65 through CWM, LLC.

Ron is also actively involved in the community. He and his wife, Jeanie, founded [The Dreamweaver Foundation](#), a non-profit organization dedicated to fulfilling end-of-life dreams for seniors with terminal illnesses. He also founded the American Charitable Foundation — a foundation established for a more efficient disposition of charitable assets and served as a past President of the Child Saving Institute.

Ron has shared his success principles, as documented in his book, *Tested in the Trenches*, with audiences worldwide. Ron coauthored the *New York Times* best-selling book *Avalanche*, and the blueprinting process that goes with it. Together, these tools help advisors learn how to clarify their mission, vision and values by setting business and life goals. His most recent book, *The Sustainable Edge*, released in 2016, was written for business owners who are seeking a fuller, more rewarding work-life balance.

Ron and Jeanie reside in Omaha and have three wonderful children, two dogs and a cat. He enjoys spending time with his family, collecting and drinking wine, golfing, flying, pheasant hunting and he's an avid Nebraska Cornhusker fan.

*Please note that the amount of Carson Group's "Assets under Advisement" is considerably larger than the amount of the firms regulatory "Assets under Management." Assets under Advisement include regulatory Assets under Management reported in CWM, LLC's Form ADV I, in addition to assets with respect to which CWM, LLC may provide consulting and/or financial planning services, but does not have any management, execution or trading authority. CWM, LLC's regulatory Assets Under Management can be found in Item 5.F of CWM, LLC's Form ADV I, available at <http://www.adviserinfo.sec.gov>.

*Barron's magazine, October 20, 2014 issue. The 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. Investment performance isn't an explicit component because not all advisors have audited results and because performance figures often are influenced more by clients' risk tolerance than by an advisor's investment-picking abilities.

*Registered Rep Magazine, August 2010 issue. The ranking, as identified by Registered Rep, reflects the assets under management using the Discovery-RR database system. Discovery is an online database of financial service intermediaries by the Financial Information Group of Shrewsbury, NJ. Discovery maintains data on the registered rep universe then validates the ranking via direct survey.

¹ 1991-2016; Based on annual production.