Wealth Designed. Life Defined.®

As a Carson Partner, we provide the top resources and thought leaders of a national company, while still knowing you by name when you stop by. We are committed to helping you and your family grow on your terms and your timeline.

CARSON PARTNERS

How We Serve You

Our goal is to make the complex simple so you can focus on living the life you want. We provide:

Guidance to help you set and work towards your financial goals so you can live the life you've always wanted.

Accountability so you can avoid emotional decision-making and stay on track.

Organization to provide a clear picture of your financial situation, free of clutter or confusion.

Education so you can invest with the confidence that comes from understanding your portfolio.

A Trusted Partner to collaborate with you through the twists and turns of life.

The Carson Ecosystem

Technology

Tools and resources to help you stay informed and easily access your account.

Professional Support

Deep financial planning ability including advisors experienced on complex solutions.

Investments

In-house and outside investment strategies that fit your needs.

Operations & Compliance

A skilled team dedicated to making sure we are in compliance with our fiduciary responsibility.

Legacy Building

Trust professionals, an estate planning team and lawyers helping you plan the future of your wealth.

Who Is Carson Partners?

Founded in 2012, Carson Partners simplifies the complexity of running a wealth management firm by managing and executing marketing, compliance, technology, investment management, and operations for advisory firms. Our Partners are committed to being the most trusted for financial advice and making the complex simple for investors.

Carson Partners is comprised of nearly 100 firms across the US that collectively serve more than 24,000 families and manages over $8 billion in Assets Under Management. With a team of financial advisors and over 200 stakeholders in support roles, Carson Partners is built to meet the needs of investors at any stage of life – whether you're just starting out or getting ready to retire. Ron Carson, CEO and Founder, is a frequent guest on Fox Business and Bloomberg where he is sought out for his market insights. He is a New York Times bestselling author, celebrated speaker at conferences and events around the country, a member of the Financial Advisor Council at CNBC, and a frequent contributor to Forbes.

Meet the Carson Team

Ron Carson
Founder & CEO

Aaron Schaben
President

Teri Shepherd
President

Jamie Hopkins
Director of Retirement Research

Wealth Enhancement Group
3 JDs / CTFA / CAP® /ChFC® / FBS®

Research Team
2 CFAs

Investments Team
3 CFAs / 1 CIPM / 1 PhD

By the Numbers
(as of March 2019)

- **28,000+** Families Served
- **101** Locations
- **93** Partner Firms
- **36** States
- **300+** Team Members

Accolades

- **Barron's** Hall of Fame: Inaugural Inductee
- **Barron's** Top 30 RIA Firms
- **Barron's** Top 100 Financial Advisors: #9 in US
- **Barron's** Top 100 Independent Advisors: #2 in US
- **Barron's** Top 100 Independent Advisors for 10 Years Straight
- **Barron's** Top RIA Firm Executives: Ron Carson
- **Financial Times** 300 Top RIAs
- **Forbes** America's Top Wealth Advisors
- **Forbes** America's Top Millennial Advisors
- **Forbes** Top Next-Gen Wealth Advisors
- **Forbes** Best In State Wealth Advisors
- **Wealth Management Industry** Award Finalist: Disruptors
- **WealthManagement.com** Top 25 High-Net-Worth Advisors
- **Inc. 5000** Fastest Growing Private Companies in America
- **InvestmentNews** Best Places to Work for Financial Advisors
- ***American Banker*** Best Places to Work in Fintech

Forbes Top-Rated Team*

* The Barron's Hall of Fame Award is given in 2014 to inductees who have appeared on the Barron's Top 100 Independent Financial Advisors list 10 straight years. Over 4,000 advisors who wish to be ranked fill out a 102-question survey about their practice, data is verified and 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.

* Forbes ranking is based on quality of practice, telephone and in-person interviews, client retention, industry experience, review of compliance records, firm nominations and quantitative criteria. 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. InvestmentNews Icons and Innovators award recipients were selected based on the broad definition of, those who have conceived new ideas and tools that have propelled the industry forward. Recognition from rating services or publications is no 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

Carson Partners
13321 California Street
Dodge Plaza, First Floor
Omaha, Nebraska 68154

carsongroup.com
888.321.0808
info@carsongroup.com