



2025 State of Women in Wealth Management

A Clear and Intentional
Roadmap for Success



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Introduction to Carson's 2025 State of Women in Wealth Management Report

At Carson Group, we've witnessed firsthand the remarkable success and profound career fulfillment that women in wealth management can achieve, and we're committed to expanding these opportunities. With women projected to control over \$30 trillion in assets by 2030, there's an unprecedented demand for women advisors who bring unique perspectives and approaches to client relationships. Yet despite this opportunity, women currently hold just 24% of Certified Financial Planning (CFP®) positions in financial planning—a gap that represents both a challenge and an extraordinary opportunity.

Our 2025 Women in Wealth Management study delves into how accomplished women advisors define success, structure their practices for exceptional client satisfaction, and continuously invest in their growth. As CFP® Board Chair Liz Miller powerfully articulates: "Women's moment in financial planning isn't coming – it's now."

The research presented in this report provides a comprehensive blueprint for women to understand what it takes to succeed and to help other women do the same. By sharing these insights and strategies, we can collectively accelerate the transformation of wealth management into a field where women lead, thrive, and redefine what's possible.

"Women's moment in financial planning isn't coming—*it's now.*"

—Liz Miller, CFP® Board Chair

Report Summary

Based on an extensive survey of 151 women financial advisors and in-depth interviews with 17 women who manage over \$100 million, our research uncovers three vital insights that highlight the unique and effective strategies women rely upon to achieve success.

1. Evolving Definitions of Success with Client Satisfaction as the North Star

Throughout their careers, women in wealth management consistently define success by the quality of their client relationships. Client satisfaction remains the top measure of professional achievement, even as other priorities, like work-life balance and contributing to the broader community, grow in importance over time. Notably, traditional industry benchmarks like assets under management consistently fall outside the top three success factors, revealing a clear disconnect between the metrics institutions prioritize and the more holistic, client-centered definitions of success women advisors hold as their careers progress.

2. Designing for Client Satisfaction: Turning Intention into Infrastructure

Driven by a desire to deliver exceptional client service, women design their practices to prioritize relationship depth over traditional growth metrics. Through strategic investments in operational efficiencies, relationship-enhancing technology, and trusted team support, they build scalable models that reflect

151 total women financial advisors surveyed

- 100 with under \$100M AUM
- **51 with over \$100M AUM**



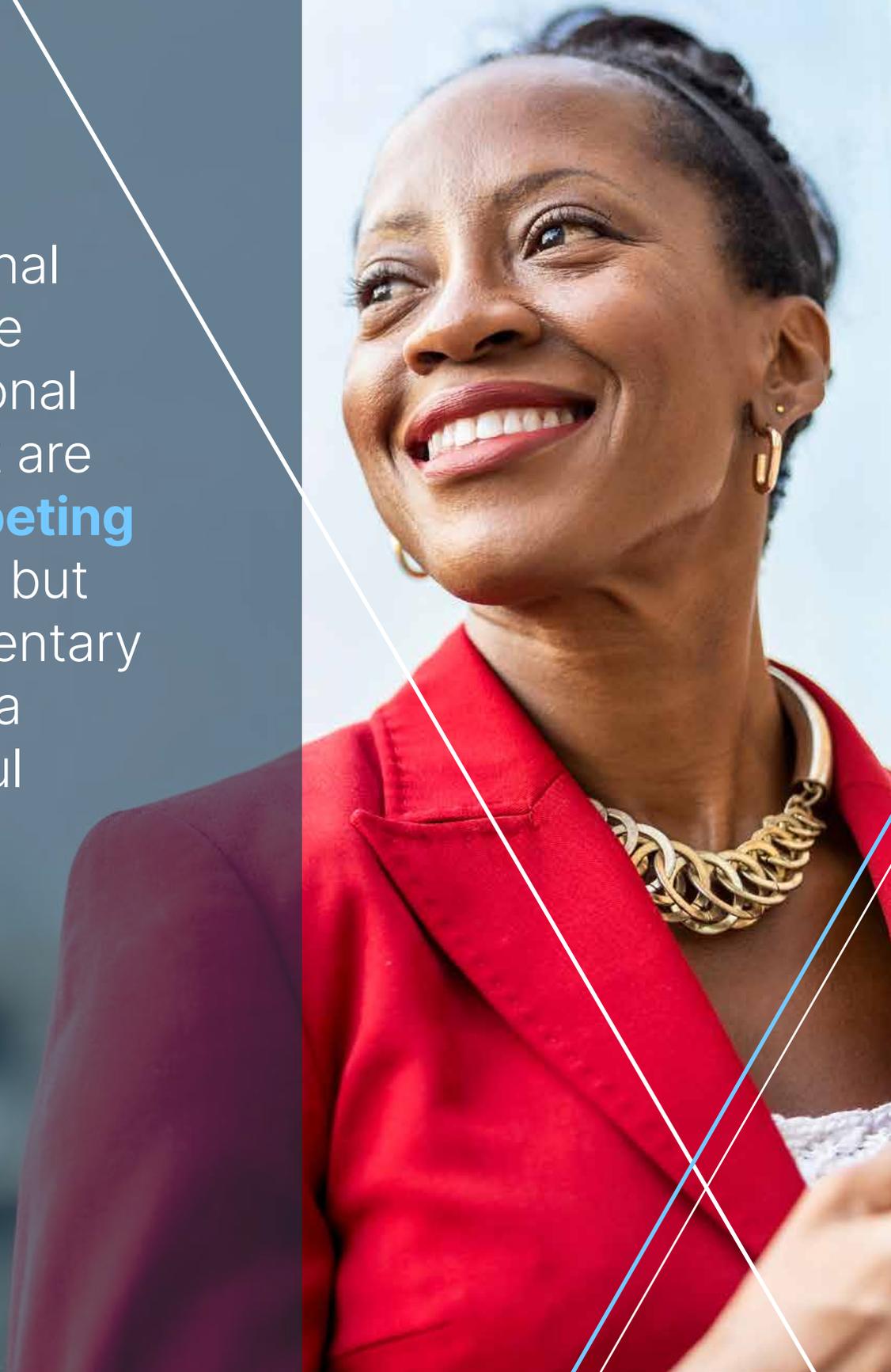
their values. This intentional approach enables them to consistently provide the high-touch, personalized experiences their clients value the most.

3. Investing in Themselves Helps Advisors Show Up Stronger for Clients and for Themselves

Women advisors drive growth by investing in themselves—through advanced certifications, strategic technology, mentorship, and thoughtful succession planning. This ongoing commitment to personal and professional development sharpens their expertise and builds confidence in a male-dominated field. It also strengthens client relationships, supports work-life balance, and creates space to lead with impact. In doing so, they model a modern, values-driven approach to success that elevates both their businesses and the profession.

Together, these three insights provide a window into how women are redefining wealth management success while offering a foundation for meaningful change. To translate these findings into action, the report concludes with a practical roadmap outlining women advisors' proven strategies to build relationship-driven, values-aligned, and sustainable practices.

Professional excellence and personal fulfillment are **not competing priorities** but complementary facets of a successful career.



INSIGHT 1

Evolving Definitions of Success with Client Satisfaction as North Star

The wealth management industry, historically shaped by male-dominated leadership structures, has long relied on Assets Under Management (AUM) as a central benchmark of professional success. AUM is a proxy for business growth and advisor performance, used in firm valuations, compensation models, regulatory filings, and industry rankings like *Barron's Top RIA Firms* and *Financial Times Top Advisors*. It is a metric widely accepted as shorthand for value creation and market credibility.

However, this reliance on AUM raises an important question: Does this metric align with how experienced women in wealth management define success?

To investigate this, we studied 51 women with 10 or more years of experience in the industry and over \$100 million in AUM. Participants were asked to rank the key factors that defined their success - first, as they would have described it during the initial five years of their profession, and second, as they understand it today. This longitudinal lens allowed us to explore how the personal definitions of success evolve over time and whether they continue to align with industry norms. **[CHART 1]**

The results revealed a compelling and consistent insight: client satisfaction

was the top measure of success in both timeframes, suggesting it serves as a “north star” for women in the field. Despite the industry’s emphasis on financial metrics like AUM, women consistently prioritized the quality of their client relationships and outcomes above all else.

That said, other priorities shifted meaningfully over time.

In the first five years, participants placed higher importance on career accomplishments (e.g., promotions and income), followed by personal growth and impact, and then maximizing AUM or revenue, which ranked fourth. Interestingly, work-life balance and contributions to the broader community and industry were notably lower in early-career rankings.

In contrast, today’s rankings reveal a more values-aligned and holistic view of success. Work-life balance rose to the second position, and contributing to the broader community and industry climbed into the top six. Meanwhile, maximizing AUM/revenue dropped in relative importance, ranking fifth overall.

These shifts suggest a reorientation of priorities that comes with experience. While external validation and performance-based metrics dominate early career thinking—likely in response to industry expectations—seasoned professionals tend to emphasize sustainability, personal fulfillment, and broader impact.



|CHART 1|
How Women Define Success in the First 5 Years

In the first 5 years of your experience, how did you personally define success as a woman working in wealth management?

1. Having high client satisfaction
2. Career accomplishments (promotions, income)
3. Personal growth and impact
4. Maximizing AUM/revenue
- 5. Work-life balance**
6. Longevity in the industry
7. Emphasizing personal fulfillment
- 8. Contributing to the broader community and industry**
9. Industry awards

Definition of Success Evolves with Experience

How do you define success as a woman working in wealth management today?

- 1. Having high client satisfaction
- ↑ 2. Work-life balance**
- ↓ 3. Career accomplishments (promotions, income)
- ↓ 4. Personal growth and impact
- ↓ 5. Maximizing AUM/revenue
- ↑ 6. Contributing to the broader community and industry**
- ↓ 7. Longevity in the industry
- ↓ 8. Emphasizing personal fulfillment
- 9. Industry Awards

Perhaps the most telling aspect of women's prioritization of high client satisfaction is the extraordinary loyalty that high-performing women advisors demonstrate toward clients across all asset levels. While industry norms often reward advisors for pursuing high-net-worth households, only 6% of the high-AUM women in our study reported that their average client has investable assets exceeding \$2 million. This striking statistic underscores a fundamental departure from conventional growth strategies, often encouraging advisors to "graduate" smaller clients in favor of ultra-wealthy portfolios.

Instead, the women in our study—many of whom manage over \$100 million in assets—consistently prioritize long-term relationships over asset thresholds. Their success is based on cultivating authentic connections, delivering consistent client value, and maintaining loyalty to a diverse range of clients. This relationship-centered approach suggests that sustainable business growth can emerge not from exclusivity but from trust, impact, and service across the wealth spectrum.

A Note on AUM as a Research Lens

While our study groups advisors by AUM and years of experience to understand behavioral and strategic trends, it's important to clarify: the women in our study do not define success by AUM, nor do we suggest they should. In fact, AUM consistently ranked outside the top three success factors across all respondents.

That said, segmenting by AUM helps highlight practice design differences and scaling strategies among advisors who have achieved sustained business growth. In other words, we use AUM not as a measure of worth, but as a proxy for access to different decision-making opportunities, particularly around hiring, delegation, and infrastructure investment. The deeper insight here is that even among advisors with large books of business, client satisfaction—not AUM—is the truest measure of success.

A woman with curly hair, wearing a red sleeveless dress, is shown in a close-up on the left side of the image. She has her hands clasped and appears to be speaking. In the background, a stage panel discussion is taking place with three women seated in white armchairs. The stage is lit with blue light, and a large screen is visible behind them. The foreground shows the backs of several audience members seated in a dark theater.

“While common growth strategies encourage advisors to shed smaller clients in favor of high-net-worth portfolios, top-performing female advisors cultivate authentic connections using **long-term relationships** as the foundation for sustainable business growth.”

Heather Randolph Carter
Chief Marketing Officer,
Carson Group

INSIGHT 2

Designing for Client Satisfaction: Turning Intention into Infrastructure

While our first insight reveals how women define success through the lens of client satisfaction, an even more powerful revelation lies in how they operationalize that priority. Unlike those who espouse client-centricity while maintaining conventional business structures, successful women advisors intentionally reshape their practices to deliver exceptional client outcomes. They don't simply aspire to client satisfaction—they architect their firms around it.

This crucial distinction connects aspiration and achievement. Women who scale their practices successfully do so by strategically investing in infrastructure that aligns their operations, technology, and team with the client experience. Our research reveals three areas of infrastructure priority: operational efficiency, technology, and strategic hiring, delegation and outsourcing.

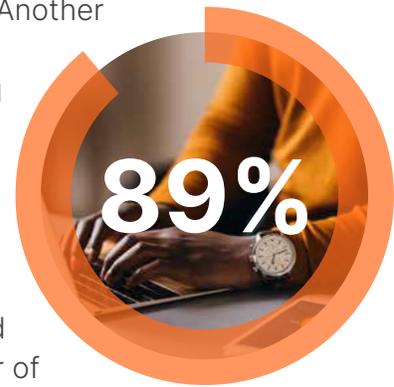
Operational Efficiency as a Client Experience Strategy

When asked to identify the most important elements for scaling their firms, 60.26% of respondents named operational efficiency as their top priority. For these advisors, operational excellence is more than an internal performance measure—it's a strategic tool for enhancing the client experience.

Efficient processes create the foundation for consistency, reliability, and responsiveness, strengthening trust and satisfaction. From onboarding to service delivery, streamlined operations ensure that clients receive timely, accurate, and thoughtful support, which are hallmarks of a high-quality advisory relationship. In this way, operational efficiency serves as a core enabler of client-centric service, not merely as a time-saver for advisors or a back-office enhancement.

Tech that Connects, Not Replaces

An overwhelming 89% of women advisors identified technology as a significant enabler of their success. Another 29% said that technology was a key factor in scaling their business, and 36% said that the right tool early in their careers was pivotal. For these women advisors, technology enhances productivity and acts as a strategic enabler of both scale and service quality.



Rather than replacing human interaction, these tools are deployed to streamline workflows, reduce administrative burden, and expand capacity, allowing advisors to grow their practices without sacrificing the high-touch service that defines their client relationships. By leveraging the right technology, advisors create scalable infrastructure that supports consistent, personalized engagement at every stage of the client journey.

One respondent captured it well, *“Technology allowed focus on advising rather than administrative tasks.”*

Among these, Customer Relationship Management (CRM) systems emerged as the most valuable technological asset, with 64.71% of high-performing advisors naming CRM as their top tool. This reflects a consistent pattern: successful women advisors leverage technology to ensure every interaction is thoughtful, timely, and relationship-driven (not to replace advisor-client touchpoint opportunities).

As another advisor reflected, *“Based on feedback from clients, it is the level of customized service and responsiveness to their needs, along with personal connection, that sets us apart.”*

Strategic Delegation: Building Teams Around Client Care

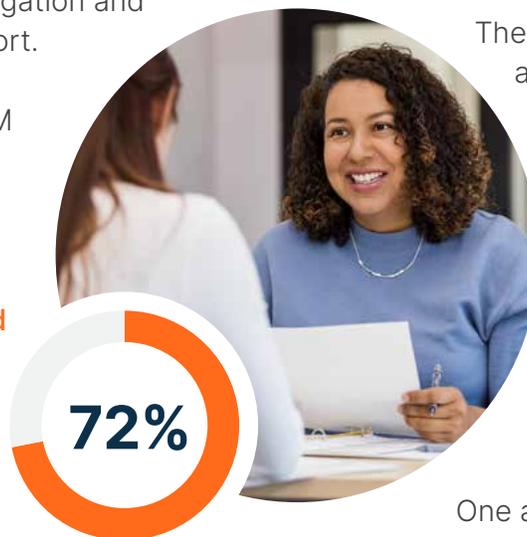
For many women advisors, building a client-first business also means letting go of the expectation to “do it all.” While societal norms often reward those who manage every detail themselves, our research reveals a different path to success—one defined by strategic delegation and early investment in support.

Advisors with over \$100M in AUM stood out for their willingness to hire before they felt fully ready. **In fact, 72% of high-AUM advisors cited hiring a team member as a pivotal decision in scaling their firm, compared to just 43% of their peers with lower AUM.** These successful women recognized early on that freeing up their time wasn’t a privilege reserved for industry leaders but a strategic growth lever accessible to all. Delegating non-

client-facing tasks enabled them to focus on building deep client relationships, driving revenue, and scaling with purpose.

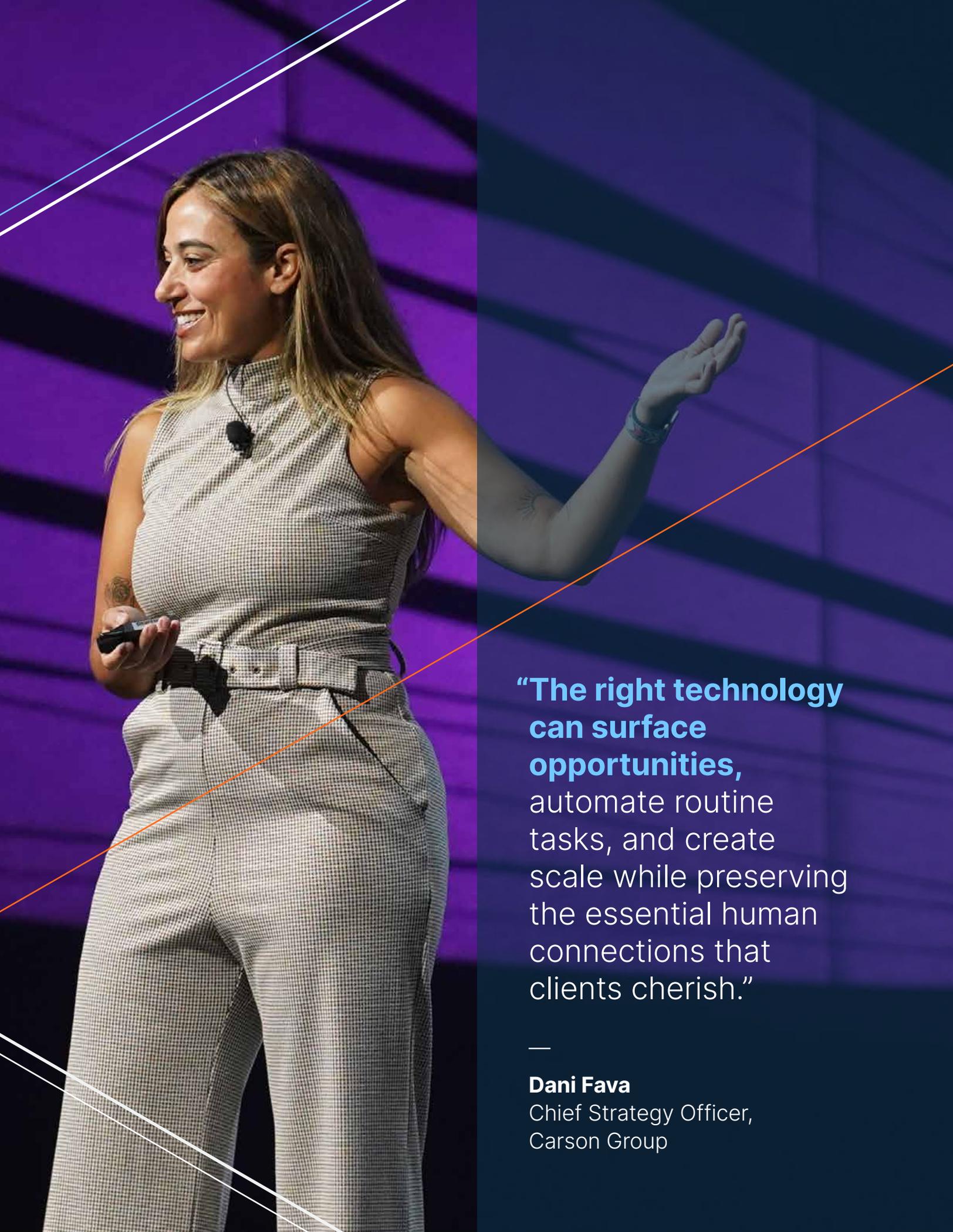
This insight is not unique to this study. Broader industry research further reinforces the value of outsourcing and operational leverage as essential tools for advisors looking to grow:

- According to the 2018 Fidelity Financial Community: Outsourcing Trends study, 43% of advisors use outside firms for core business functions.
- Of those, 77% cite time savings, 66% note increased productivity, and 57% report better operational efficiency.
- The J.D. Power 2023 U.S. Financial Advisor Satisfaction Study revealed that nearly one-third (28%) of advisors lack sufficient time to spend with clients. This shortage of client-facing time is primarily due to the increased demands of compliance and administrative tasks.



The takeaway: delegation is about creating space to do what matters most. Those who scaled successfully didn’t wait for perfect timing. Instead, they acted early, took strategic risks, and designed their businesses to support growth, sustainability, and client impact.

One advisor succinctly summarized the impact of team building: *“Expanding my team from 1-2 to 8 people improved my client experience and allowed for more efficient planning.”*



“The right technology can surface opportunities, automate routine tasks, and create scale while preserving the essential human connections that clients cherish.”

—

Dani Fava

Chief Strategy Officer,
Carson Group

INSIGHT 3



Investing in Themselves Helps Advisors Show Up Stronger – For Clients and For Themselves

While our first two insights explore how women define success through client satisfaction and intentionally design their practices to deliver on that promise, a third dimension is equally important: the ongoing investment they make in themselves. This investment enhances their ability to serve their clients and fosters confidence, resilience, and the careers they truly desire.

Our research shows that successful women in wealth management understand a key truth: they can take better care of others when they prioritize what matters most to them. This may involve building confidence through education, creating space for family, developing trusted teams, or planning for the future with thoughtful succession strategies.

Self-investment may feel out of reach amid the demands of clients, business, and life. However, intentionally setting aside time for professional development and personal fulfillment allows individuals to show up more fully for their clients and teams. In fact, 47% of survey respondents stated that getting support and professional development was one of the most important

business decisions they made in the early years of their firm.

Our study results point to a remarkable transformation. 78% of respondents reported experiencing imposter syndrome early in their careers, and nearly half (49%) of women advisors said they struggled with confidence in those early years. These were not isolated experiences but a common hurdle on an advisor's career path.

Yet, 72% ultimately overcame those doubts through a combination of experience, mentorship, and professional credentials. They didn't wait for confidence, they built it. And, in doing so, they created stronger foundations for their clients and more fulfilling careers for themselves.

Certifications and Professional Development

For many advisors, the journey to confidence and credibility began with strategic learning. **Among those managing over \$100M in AUM, 58% held a CFP® designation**, compared to just 36% of those with lower AUM. These certifications weren't just a line on a resume—they were a source of empowerment.



58%

As one advisor reflected, *"I hold CFP® and CPA licenses (and have an MBA). These designations have opened doors that wouldn't have been available otherwise."*

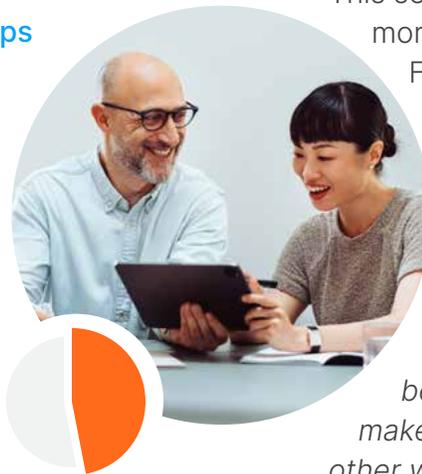
More than half (51%) of experienced women advisors rated certifications as extremely important to their success, with another 20% calling them important. In

the early career stages, 69% of high-AUM women said professional development was foundational. These investments deepened their knowledge, expanded their confidence, and enabled them to show up for clients with clarity and authority. Support systems also played a role in enabling these achievements. *“Being part of study groups kept me accountable for continuous learning,”* shared another advisor, underscoring the power of community in staying engaged in motivated throughout the learning journey.

Mentorships, Sponsorships and Support Networks

Investing in themselves also meant finding the right people to support their journey. **Nearly half (47%) of high-AUM women with more than a decade of experience cited mentorship and professional guidance as among the most important early-career decisions they made.**

These relationships offered more than technical insights—they helped women advisors stay motivated, sharpen their skills, and move forward with purpose. As one advisor shared, *“Mentorships kept me accountable for continuous learning.”* That sense of accountability and growth was often essential in navigating an industry where many women felt they had to prove themselves early and often.



“I wouldn’t be where I am today without the people who not only mentored me but actively opened doors for me...”

— Survey Respondent

Notably, a distinction must be drawn between mentorship and sponsorship. While mentors offer encouragement and advice, sponsors take it a step further—advocating on behalf of women, opening doors, and creating visibility in critical moments. One respondent captured this distinction clearly: *“I wouldn’t be where I am today without the people who not only mentored me but actively opened doors for me—true sponsors who put my name forward when I wasn’t in the room.”*

This sense of advocacy becomes even more powerful when paired with identity. For many experienced advisors, particularly those with over \$100M in AUM, gender and ethnicity set them apart in the industry. One respondent said, *“There just weren’t many women in the room, and even fewer who looked like me. I had to work twice as hard to be taken seriously, which is why I now make it a priority to mentor and lift up other women in this industry.”*

Finding the right support often requires proactive effort for women without immediate access to mentors or sponsors. As one respondent said, *“#1 for me was finding a mentor. I knew I needed to learn from someone who had been there and done that at a high level.”*

While many advisors in our study benefited from strong mentorship, the reality is that such relationships are not always readily available—especially in male-dominated environments. It’s important to recognize that identifying the right mentor or sponsor often takes intentional

outreach, persistence, and a willingness to seek support beyond one’s immediate circle. Professional communities, industry associations, women-focused events, study groups, and online networks can also become successful pathways to connection, growth, and long-term success. As one respondent shared, *“Attending a women’s symposium helped change my perspective and boost my confidence.”* Whether formal or informal, these support systems can spark personal breakthroughs and create lasting professional momentum.

Work/Life Balance: The Key to A Sustainable Practice Structure

The evolution of women advisors’ priorities reveals a striking pattern: while client satisfaction, career achievements, and AUM growth dominate early career focus, work-life balance initially ranks fifth. Yet with experience, this priority dramatically rises to second place. This shift reflects growing clarity about what it takes to build a career that lasts and a life that aligns with personal values.

Rather than letting their practices dictate their time, these women designed their businesses around how they wanted to live. As one advisor put it, *“I set my practice up like a lifestyle business. I didn’t want to work nights and weekends.”*

This intentional practice design appears crucial for sustainable success.

Among high-AUM advisors, 41% reported having a supportive partner at home, while 12% acknowledged struggling with work-life



“Complete control over my schedule allows presence at family events,”

— Survey Respondent



balance despite support. These findings underscore that even with personal support systems, deliberate business structuring remains essential to align professional demands with family priorities and personal values.

The journey toward balance ultimately stems from professional clarity and intentional practice design—a necessity recognized by top-performing women advisors who’ve mastered the delicate interplay between business achievement and personal fulfillment. As one advisor emphasized, *“Complete control over my schedule allows presence at family events,”* demonstrating how thoughtful practice management prevents burnout while serving as a powerful example to clients and colleagues about sustainable success.

Embracing Technology to Expand Capacity

Technology plays a pivotal role in helping women advisors scale without sacrificing the personalized service that defines their practices. 41% of high-AUM respondents identified finding the right technology solutions as critical to their success—not only for operational efficiency, but for creating the space and flexibility to focus on what matters most. Rather than replacing the human element, these tools serve as strategic enablers—automating routine tasks, reducing

compliance risk, and freeing up time for meaningful client engagement. They allow advisors to serve more clients without compromising the depth or quality of relationships.

As one advisor explained, *“Technology allowed focus on advising rather than administrative tasks.”* Another emphasized the lasting impact of early adoption: *“Embracing technology early was a game changer. Our CRM, automation tools, and client portals allow us to focus on advising rather than administrative work.”*

These insights illustrate how successful women advisors leverage technology to scale intentionally by providing consistent, high-touch service while creating a business that fosters both growth and balance.



Succession Planning as Client Care and Personal Peace of Mind

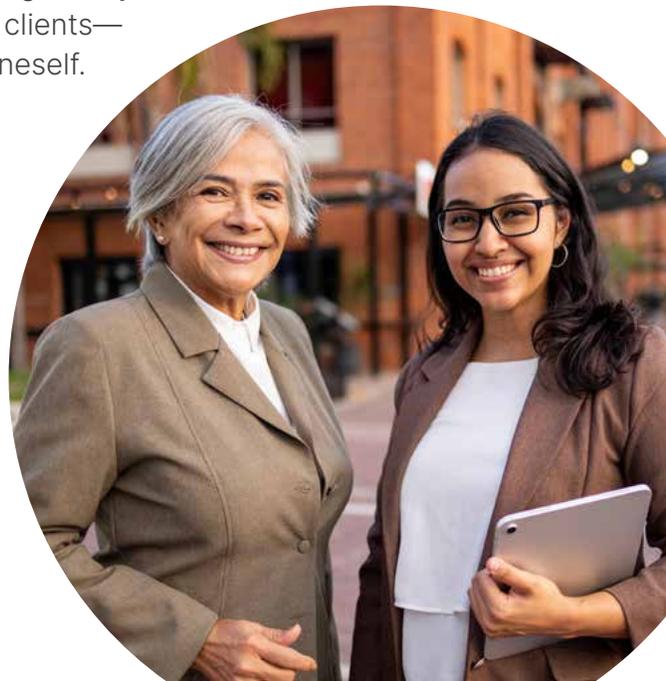
One of the most powerful expressions of self-investment is succession planning, which is both a business strategy and an act of care. Advisors who plan early do so to ensure their clients are supported even if they step away unexpectedly, retire, or scale back.

This forward-thinking approach is deeply client-centered. It communicates: “You’re taken care of—no matter what happens to me.” At the same time, it brings peace of mind to the advisor, allowing them to confidently grow their practice knowing their clients, their team, and their legacy

are protected as described by one of our respondents: *“I’m crystal clear (with my clients) how long I’m going to be around, what the succession plan is if something happens to me, and how long they can expect me to be actively their advisor. And the response from clients has been incredible.”*

Yet, despite its importance, many women advisors haven’t taken this step. In our study, **51% of respondents said they hadn’t even begun thinking about succession planning.** Among those with over \$100 million in AUM, however, 40% began thinking about an exit strategy within their first 10 years—compared to just 16% of lower-AUM advisors, highlighting a key difference in mindset and planning approach.

Women who do prioritize succession planning report greater confidence, career clarity, and long-term satisfaction. By planning ahead, they not only help protect their clients and businesses—they also create the freedom to scale, step back, or step away with intention. In a profession built on trust, preparing for the future is one of the most meaningful ways to serve clients—and oneself.



From Insight to Action: A Roadmap for Women Defining the Future of Wealth Management

The women featured in this study are reshaping success in wealth management through bold, values-driven decision-making. They build practices aligning business growth with personal fulfillment and deep client impact.

The following strategies reflect the most common and effective approaches experienced women advisors use to turn vision into reality. These actions are designed to support both established professionals and emerging talent as they build purpose-driven, resilient, and relationship-centered practices.

- **Deepen client relationships.** Trust-based connections and client relationships that endure through market cycles, life changes, and generational transfers transform the client experience from a series of isolated transactions into a lasting partnership built on dedicated advocacy and an unwavering commitment to client goals. By leveraging CRM systems and automation tools strategically, you can maintain this depth of engagement while staying responsive and consistent in your communications with every client throughout their journey.
- **Hire strategically and delegate early.** Time is an advisor's most precious resource. By delegating non-client-facing tasks early, you create capacity for relationship-building, business growth, and leadership while preserving work-life balance. Consider both team development and outsourcing to maximize efficiency and reclaim valuable hours for your highest priorities.
- **Actively build your support network.** Mentorship doesn't just happen. It has to be sought. Connect with mentors and sponsors who will guide, advocate, and open doors. Join peer networks, women's associations, and study groups. As you grow, pay it forward by mentoring others.
- **Pursue certifications and commit to lifelong learning.** Enhance your credibility and confidence with certifications like CFP®, CFA, and CPA. Stay sharp with ongoing training in sales, technology, leadership, and communication, and stay connected to the latest trends through industry events and learning communities.

- **Design work-life balance with intention.** Build a practice that reflects your life, not the other way around. Set clear boundaries, adopt tools to minimize administrative burdens, and structure your schedule around the people and activities that matter the most to you.
- **Build confidence through action.** Experience builds confidence, but so does community and continuous development. Recognize imposter syndrome for what it is and counter it with professional growth, mentorship and intentional support systems.
- **Use technology to scale with purpose.** Adopt financial planning, automation, and CRM systems to deliver high-touch services at scale. The right technology is operational and has the ability to enhance your impact
- **Plan for long-term continuity.** Start thinking of succession planning early, even if retirement is far off. Advisors who begin planning early create continuity for clients, preserve their practice's legacy, and ensure financial security for themselves and their teams, regardless of when or how a transition occurs.

About 2025 Women in Wealth Management Report

Carson Group has taken the lead in recruiting and retaining women in wealth management careers, seeking to gain a deeper understanding and insights into the underlying issues. Our inaugural research in 2022 sought to enhance women representation. Our follow-up study in 2023 uncovered industry barriers and examined issues of empowerment. The 2025 Women in Wealth Management study represents a comprehensive culmination of our research journey, incorporating our previous objectives while broadening the narrative to illustrate how women advisors define success, identify effective growth strategies, and offer actionable insights for career advancement.

Study Methodology

In this study, we gathered qualitative data through a series of interviews conducted with 17 women financial advice professionals with over \$100M in assets under management (AUM), and then we gathered quantitative data through a survey of 151 participants with varying levels of experience, using both multiple-choice and open-ended questions.

Targeted emails were used to recruit financial advice professionals for the interviews. The survey was conducted among financial advice professionals who volunteered after seeing organic and paid posts on social media, email marketing and targeted digital ads. We collected the survey responses using Survey Monkey. Both the quantitative data regression analysis and the qualitative analyses were conducted by Hidden Insights Group LLC, a research and strategy organizational change consulting firm. Both quantitative and qualitative data were analyzed specifically by Jen Rutley, principal at Hidden Insights.

To encourage participation, donations were made to the Certified Financial Planning Board's Aspire and WIN Program and The American College for Financial Services Center for Women in Financial Services to support the next generation of financial professionals.

Carson's Commitment to Expanding Gender Participation in Financial Services

At Carson Group, we understand the importance of having financial advisors who reflect the communities they serve. As women make up more than half of the U.S. population, we feel it is imperative to increase representation of women in the wealth management industry.

We are dedicated to increasing representation in the industry by:

- Conducting studies like this to gauge the sentiment of women in the industry and identify practices and barriers that are detrimental to their success.
- Building a supportive community of women and male allies who make a commitment to sponsoring and supporting women.
- Building inclusive cultures that encourage women to not just survive, but thrive, while also fostering mutual respect for all stakeholders, not just those in client-facing roles.
- Actively recruiting more women to join our profession.
- Ensuring that our profession values and supports the women we recruit.

This report is an integral part of Carson Group's broader initiative to promote greater representation of women within the industry through research, events and community building.



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