Money Doesn’t Have To Be Complicated.

Are you confused by most financial advice? If so, you’re not alone.

Talk with an Advisor

Effective Game Plan

Advice in Common Language

Straightforward Fees

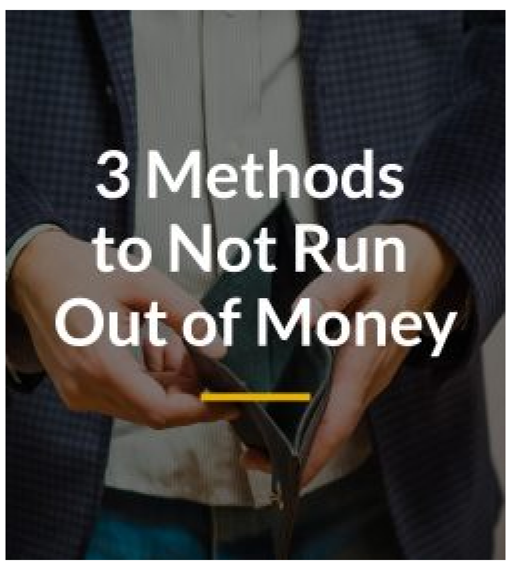
Forbes

BARRON'S
HALL OF FAME

Inc. 5000
AMERICA'S FASTEST-GROWING PRIVATE COMPANIES

InvestmentNews
ICONS & INNOVATORS

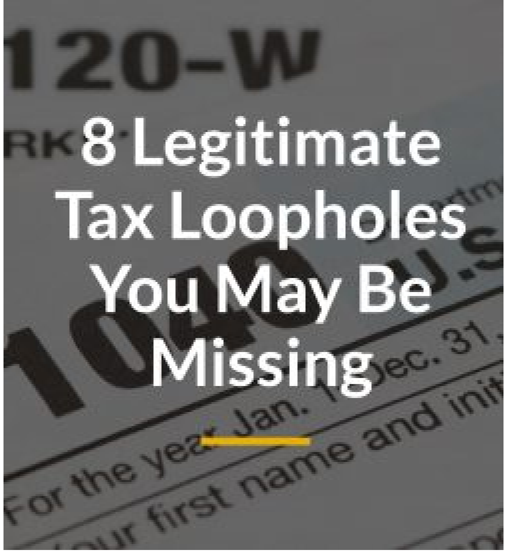
Download one of our free guides.




4 Common Mistakes People Make With Their First Million


7 Secrets to Accumulating Your First Million


7 Tips to Successfully Transfer Wealth to Your Kids



Get more Insights

People deserve to understand what's happening with their money.

Have you ever sat across from a financial advisor and only understood every third word they were saying? And yet they were talking about your money, your life and your future.

At Carson Wealth, we believe clients should understand
happeni

explaining investments as they are at making them.

+ **What are you going to do with my money?**

+ **Can you handle the complexity of my situation?**

+ **How can you make my life easier?**

Discover the right investment strategy for you.

Tell us a little more about your investment objectives and level of comfort with risk.

By what percentage do you expect your portfolio to grow annually over the long-term (10+ years)?

0-2%

2-4%

4-6%

6-8%

More than 8%

Next

How to get started.

1. Schedule an appointment

2. Meet with us for a custom listening session

3. Get your personalized strategy

Schedule an appointment

Watch video

Request an Appointment.

The path to pursuing true wealth starts with meeting your Carson Wealth advisor. Please get the conversation started by providing your information, and we'll reach out as soon as possible!

First Name*

Last Name*

Email*

Phone Number*

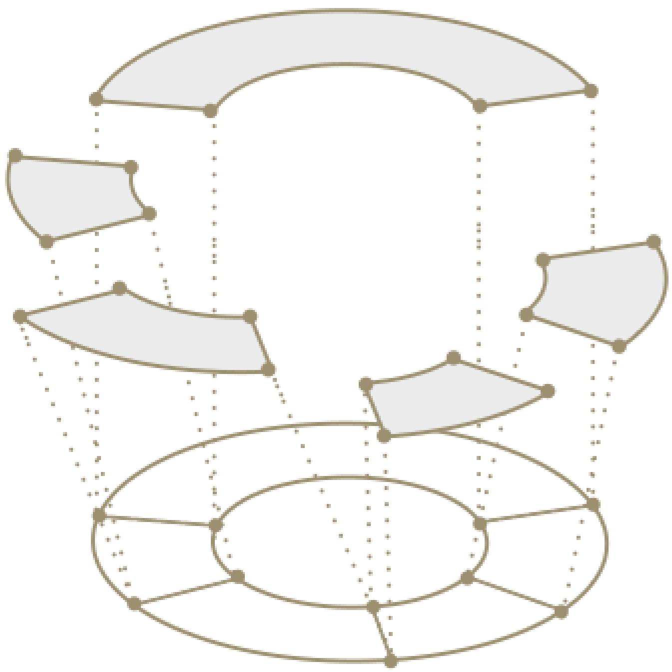
Zip Code*

State*

Submit

Our financial planning services are built on trust, transparency and accountability.

Our experienced team of professionals will develop a personalized plan th



Personalized Investment Management

Carson Wealth's mission is to inspire our clients to achieve True Wealth through education, communication and service, which exceed their expectations. We offer a comprehensive suite of investment management and financial planning solutions, serving affluent families, business owners, executives and institutions.

Contact one of our financial advisors to request a complimentary consultation.

Investment Management

Disciplined investment strategies are the foundation of our investment management process. Our time-tested strategies are designed to meet a variety of investment goals and objectives.

Read more

Carson Partners

Carson Partners are growth-minded advisors wholly dedicated to helping c
their wealth and design a lasting legacy for their f

Read more

Our Locations

Headquartered in Omaha, Nebraska, Carson Wealth has office locations and advisors across the country. Contact us today to speak with a financial advisor or financial professional nearest you.

Read more

Insights

Carson Wealth's team of professionals provide you with transparent and proactive communications to equip you with the knowledge you need. Read more

Busting Three Half-Truths About Reverse Mortga

A few years back, I conducted and published research in the *Journal of Financial Planning* that showed Americans don't understand reverse mortgages. In fact, respondents scored below 50 percent on a 10-question true-false quiz.

Read more

Blog post

How to Buy a Car Without Losing Your Mind (or Your Wallet)

By Erin Wood

Having to buy a car is like having a sliver stuck under my fingernail. It's painful and annoying, I know I have to deal with it, but it's going to take forever. Might as well pack a lunch too, because the second you decide you want to test drive something they have you trapped.

Read more

Weekly Market Commentary

Weekly Market Commentary – July 1, 2019

The S&P 500 slipped slightly last week after reaching a new high the previous week. The S&P 500 declined 0.3%. The MSCI ACWI inched 0.1% higher, and the Bloomberg BarCap Aggregate Bond Index rose another 0.4%. Yields continue to fall as expectations of an interest-rate cut mount.

Read more

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