

BALANCED INVESTING

Navigation of calm and rough markets



WHO WE ARE



Cardan Capital Partners is an independent wealth advisory firm providing comprehensive wealth management and financial guidance.

Our mission is to provide you with the optimal path to grow your wealth and to plan the best ways to retain and ultimately transfer your assets. We accomplish this by creating and implementing strategies that are tailored to your unique goals. We also coordinate with your other advisors — including attorneys, accountants and family office practitioners — to ensure that our collective advice is fully integrated.

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OUR PROCESS



YOUR PERSONAL CHIEF FINANCIAL OFFICER

We act as our clients' "Personal CFO," providing ongoing consultation and advice.

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COMPREHENSIVE FINANCIAL PLANNING

We employ a disciplined approach to learning our clients' full financial situation – from both sides of their current balance sheet to their expectations for the future.

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OUR INVESTMENT PHILOSOPHY

Our client-centric perspective drives everything we recommend — from individual investments to personalized asset allocation.

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NEWS

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10 common Medicare mistakes

by Marti Awad | Jul 2, 2019 | Good to Know

Clients often ask us for help with Medicare planning. The rules can be confusing, and making assumptions can be costly. Cardan Capital Partners Co-Founding Partner Marti Awad recently teamed with Carol Janz Booth of



Cardan intern hopes to help more young people have financial literacy

by Cardan Capital Partners | Jul 1, 2019 | Finance and family

Cardan Capital Partners is pleased to introduce William “Mac” Lyons, an intern learning the ropes of finance in our offices this summer. Mac, a native of the San Francisco Bay Area, is a rising junior majoring

Group Insurance Analysts Inc., to share some common...

in accounting and finance at the University of Colorado...



Colorado artist Jordan Casteel inspires at Denver Art Museum

by Marti Awad | Jun 12, 2019 | Cardan in the Community

If you haven't already, treat yourself to the Denver Art Museum's exhibit "Returning the Gaze," which features almost 30 paintings from Denver-born artist Jordan Casteel, who is now based in New York. The exhibit is on view through Aug. 18. I first toured the exhibit...



RIA magazine, Citywire check in with Cardan

by Cardan Capital Partners | Jun 10, 2019 | Cardan in the Media

It was good fun to meet Isaiah Green, a relationship manager with Citywire, who stopped in recently to talk shop. Mr. Green wrote for Citywire's RIA magazine that he was in Denver to meet with "some of the Mile High City's top RIAs," and we're pleased that he stopped...

Marti Awad adds 'Lady Badass' to resume

by Marti Awad | Jun 7, 2019 | Good to Know

Well, here's a title I'm excited to add to my CV: Lady Badass. I have been bestowed this honor by founders of the #LadyBadassery



Highlights from Mohamed El-Erian CFA conference presentation

Project, a wonderful initiative to highlight women leaders worldwide. It started with one woman, personal and corporate coach Joanna Bloor,...

by Marti Awad | May 28, 2019 |

Good to Know

For Chartered Financial Analysts like me, every annual meeting of the CFA Institute is a must-attend event, and the 72nd CFA Institute Annual Conference in London proved to be no exception. This year's theme: "Disruption: The Reality in Investment Management." Among...

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CARDAN IN THE NEWS

Some of the world's top news organizations have turned to Cardan Capital Partners for insight and perspective.

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The New York Times

THE WALL STREET JOURNAL.

Seeking Alpha^α

InvestmentNews

Bloomberg

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CARDAN IN COMMUNITY

We at Cardan Capital Partners believe strongly in giving back to the communities where our clients and employees live and work. We support local and national nonprofit organizations through time, talent and treasure. We invite you to learn more about our volunteer efforts, both individual and as a team.

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About Us

Our Process

Our mission

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The Cardan Difference Comprehensive Financial Planning

Our Approach

Investment Philosophy

Client Experience

Important disclosure information

Our Team

News

Latest Updates

News

10 common Medicare mistakes

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