We are

Registered Investment Advisors
Fiduciaries

Schedule a complimentary consultation

Click Here

About Us

Carlton, Hofferkamp and Jenks Wealth Management is a fee-only registered investment advisory firm located in The Woodlands, Texas.

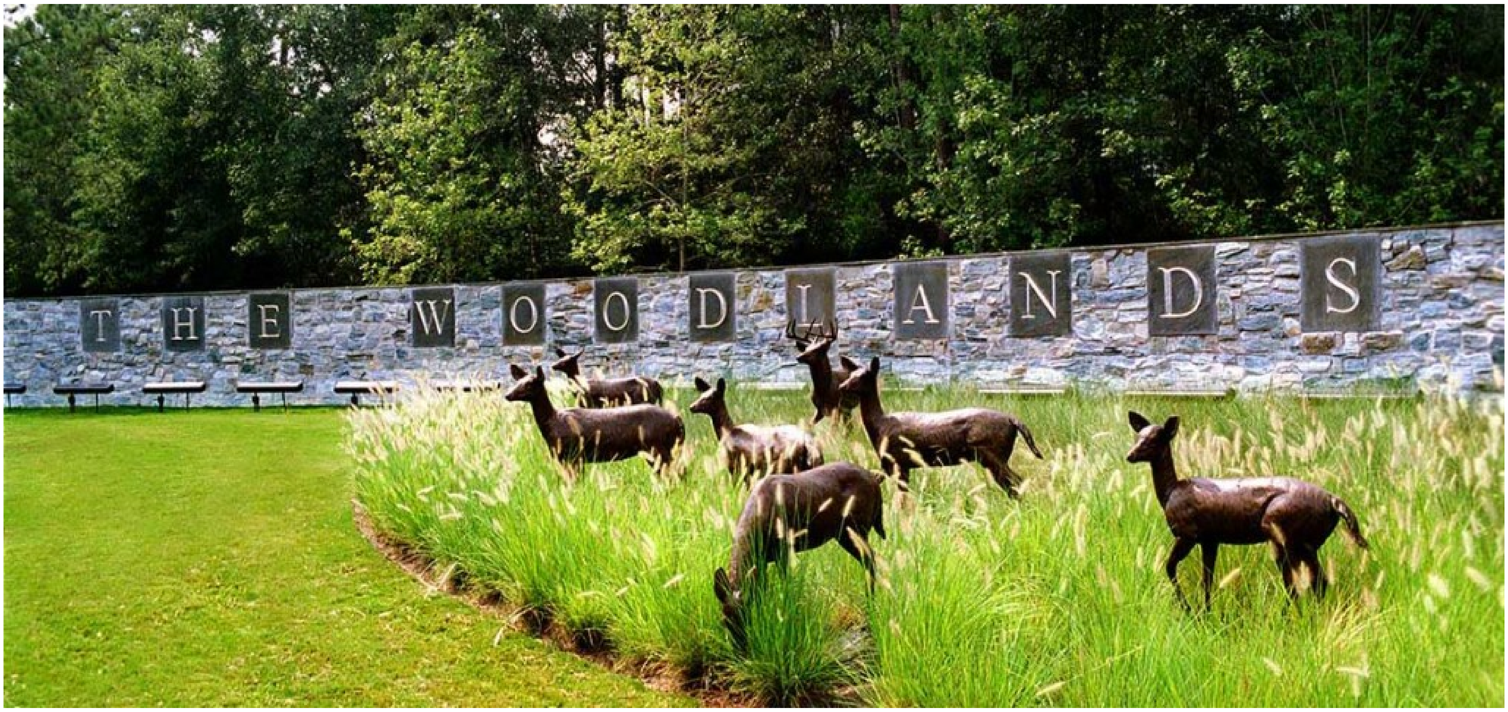
We are independent and have no affiliation with any financial institution, our commitment and focus is on our clients.

Ranked among Top Houston Area Wealth Management Firms and Practices by Houston Business Journal.

Recipients of the prestigious Five Star Wealth Manager award for seven consecutive years.

About You

Let us guide you on your path to financial success.



Existing Client Questionnaire (https://chjwealthmanagement.com/existing-clients-questionn

New Client Questionnaire (https://chjwealthmanagement.com/new-client-questionnaire/)

Why Experience Matters

Our team's talent has been tested through many business cycles

and periods of market volatility such as:

The investment knowledge we've gained through these experiences along with our time-tested philosophy, diligent money management and consistent communication in all market environments enable us to guide and protect our clients through these critical times.

"The only source of knowledge is experience" – Albert Einstein

Our Team

Jim Carlton > Managing Director (https://chjwealthmanagement.com/jim-carlton)

Scott Hofferkamp > CFS® – Principal (https://chjwealthmanagement.com/scott-hofferkamp)

Barbara Jenks (https://chjwealthmanagement.com/barbara-jenks)

Florence Carlton > Controller (https://chjwealthmanagement.com/florence-carlton)

Hunter Hernandez > Client Relations (https://chjwealthmanagement.com/hunter-hernandez)

John Sinitiere > Client Relations (https://chjwealthmanagement.com/john-sinitiere)

Our Approach

We have a deep commitment to the success of each of our clients and take ownership of the matters they entrust to us.

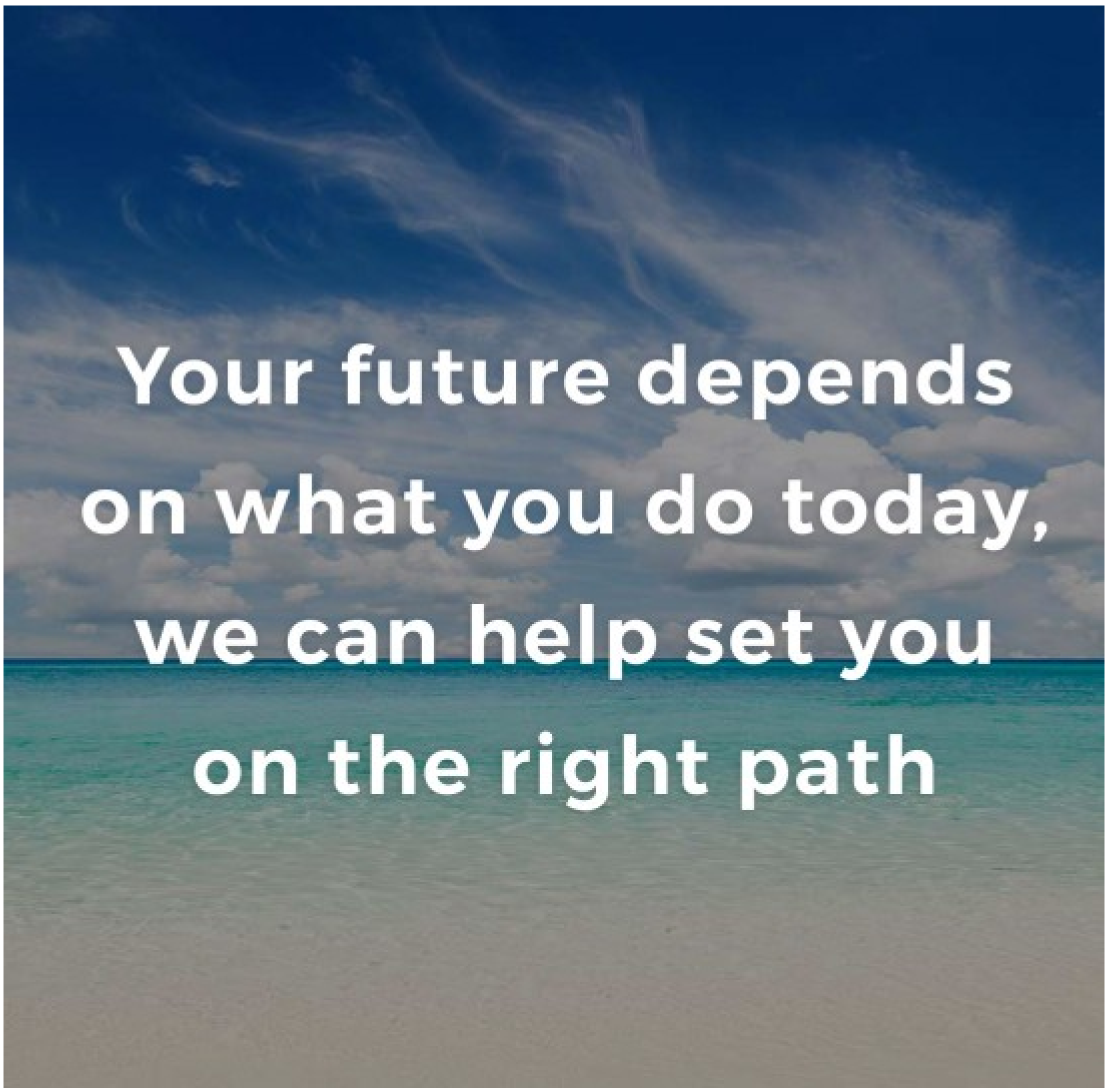
We know how hard you've worked to acquire your wealth and protecting it is our top priority.

Our investment management approach is proactive and forward-looking. As the markets evolve, we make tactical changes and attempt to take advantage of opportunities – all while ensuring investments are in alignment with your goals and risk tolerance.

Our client portfolio management is done in-house not outsourced, this equates to cost effectiveness and tax efficiencies for you.

Our process is truly personalized and each client's portfolio is specifically tailored to your goals and needs.

Retirement Planning



It is not unusual to learn individuals entering or nearing retirement often cite “losing their nest egg/savings” as their number one fear.

We believe the number one goal in retirement planning is to ensure you don't "outlive your money".

At Carlton, Hofferkamp and Jenks we believe in straight talk, period. A retirement plan must first and foremost be realistic and achievable. We start with straight talk about budgeting and living within your means to ensure your retirement assets have ample time to grow and keep up with inflation.

Through our discovery and planning process we help you chart a course to a comfortable and stress free retirement.

Next, we implement an investment strategy specifically tailored for you – providing for short term needs and allowing your nest egg to grow to meet your goals for a long and healthy retirement.

Our Views

Follow our latest observations on the economy and market activity

Read All Market Updates (https://chjwealthmanagement.com/category/market-commentary/)

Read Quarterly Outlooks (https://chjwealthmanagement.com/category/quarterly-outlook/)

Subscribe To Daily Market Updates (https://visitor.r20.constantcontact.com/manage/optin?v=001WY2H_3R

Cares Program

Small acts of kindness
when multiplied by millions
can transform the world

How We Care (https://chjwealthmanagement.com/cares-program-m/)

What Keeps You Up At Night?

We invite you to a complimentary consultation with our Chief Investment Officers – no selling, no gimmicks, just straight talk to help guide you on your path to financial success.

Schedule A Meeting (mailto:info@chjwealthmanagement.com?subject=Schedule%20A%20Meeting)

FAQ

Where are my assets held?

Carlton, Hofferkamp & Jenks does not take custody of clients assets. We partner with Charles Schwab to serve as a custodian of our client's assets. All client monies and assets are held at Charles Schwab. If a client would like us to manage their money but would like to use a different custodian, we will consider the request.

How often do I get statements?

How do I open an account?

What if I already have an account at Charles Schwab?

How do I log on to my Charles Schwab account?

Do you have a privacy policy?

Read our Disclosure Statement

How do I get a copy of your ADV form?

How do I sign up for daily market updates?

CALL US

(281) 298-2700

Toll Free: (877) 824-4299

VISIT US

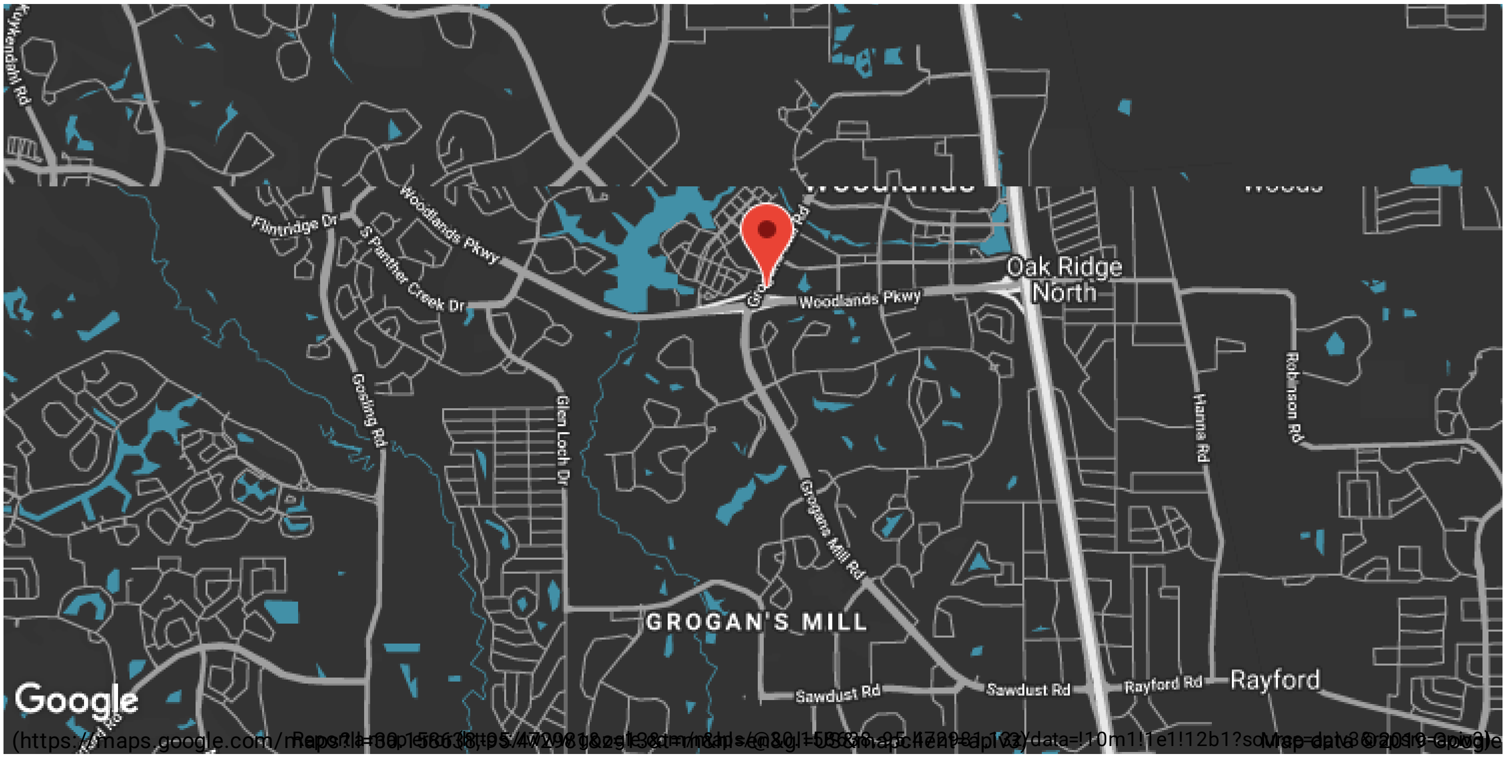
10200 Grogan's Mill Road, Suite 340

The Woodlands, Texas 77380

OUR HOURS

Monday – Thursday: 8am – 5pm

Friday: 8am – 3:30pm



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