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GENERAL INFO

First off welcome! We are glad that you have found your way to the Capital Consulting & Asset Management (CCAM) website.

Through in-depth, long-term relationships, CCAM seeks to truly understand the unique circumstances and goals of each individual client. By learning about your current financial situation and understanding the lifestyle you wish to achieve or maintain, CCAM develops sound, individualized wealth management strategies.

We consider ourselves "Wealth Managers" who specialize in the building and preservation of *wealth* while providing peace of mind to our clients. Our clients include successful professionals, businesses, families, and institutions including foundations and endowments, who expect the ongoing communication, guidance and expertise that CCAM delivers.

Whether you are looking to preserve or grow your wealth, you can trust CCAM to help you achieve your financial goals through individualized services. CCAM's area of expertise include:

- Comprehensive wealth and portfolio management (including fixed income portfolios)
- Goal-oriented financial planning and consulting
- Strategic retirement planning and consulting
- Investment policy statement design
- Asset allocation formation
- Portfolio manager evaluation and selection
- Performance reporting and monitoring
- Ongoing due diligence of investment managers

We invite you to contact us for a complimentary initial consultation today. Let's start a conversation about your financial future and discuss how together our experience can help you achieve your goals.