Carmel Capital Management L.L.C.

Headquartered in the heart of California’s scenic Monterey Peninsula, Carmel Capital Management L.L.C. is a locally-owned, full-service investment

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Investment Management

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Credentials

26350 Carmel Rancho Lane, Suite 205, Carmel CA 93923 (831) 625-1375

26350 Carmel Rancho Lane,
Suite 225
Carmel CA 93923
(831) 625-1375

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advisory firm registered with the U.S. Securities
and Exchange Commission.

The firm provides comprehensive investment
management and wealth management services for
individuals, trusts, pension plans, and charitable
and educational endowments and foundations. Our diligence, objectivity and disciplined approach to portfolio management have been preserving and growing our clients’ wealth since 1999.

We offer full transparency and independent custodianship for all client portfolios. Professionals are CFA charterholders, or CFA candidates, with extensive postgraduate education who uphold the highest ethical standards and pride themselves on their long-term clientele and strong relationships with clients’ CPAs and attorneys.

Accumulate.

Preserve.

Distribute.

Client Portal

Career Opportunities

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