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Our Services

CCa is an independent fee based advisory firm, taking great pride in empowering our clients with virtually any financial solution.

Contact Us

Your life vision. Our financial focus. Let's get started today!

About Us

The staff at CCa takes pride in its ability to help its clients to develop the best strategy to suit their needs.

Resources

CCa has served professionals, entrepreneurs, executives and families in the Central Florida area for over a decade.

Carpenter, Claydon Advisors are your Central Florida Fee Only Financial Planners. Specializing in Wealth Management and Fiduciary Services.



[Client Login Click Here!](#)

Our Services

"We work hard, so you don't have to"

We work hard, so you don't have to

We begin a long-term advisory relationship by taking a detailed look at your overall financial situation in order to:

Understand your goals

Identify opportunities

Develop strategies

Propose options

Analyze investments

Evaluate returns

Establish 'best practices'

 [Learn More](#)

NEWS & INFORMATION

Helping our clients stay informed

We have compiled some resources we feel will be helpful to you. We pride ourselves on helping our clients stay as informed as possible so that we can

better assist you in achieving your goals



Quarterly Market Review

2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Real Estate 37.96%	Emerging Market Equity 34.90%	Real Estate 42.12%	Emerging Market Equity 29.38%	U.S. Fixed Income 6.24%	Emerging Market Equity 16.81%	Real Estate 26.85%	U.S. Fixed Income 7.84%	Real Estate 27.73%	Small Cap Equity 38.82%
Emerging Market Equity 25.49%	Real Estate 16.39%	Emerging Market Equity 32.17%	Non-U.S. Equity 12.44%	Non-U.S. Fixed Income 4.39%	High Yield 19.21%	Real Estate 16.42%	High Yield 4.99%	Emerging Market Equity 19.29%	Large Cap Equity 22.19%
Non-U.S. Equity 29.28%	Non-U.S. Equity 14.47%	Non-U.S. Fixed Income 26.71%	Non-U.S. Fixed Income 11.62%	Cash Equivalent 2.94%	Real Estate 37.13%	Emerging Market Equity 18.85%	Non-U.S. Fixed Income 4.96%	Non-U.S. Equity 14.41%	Non-U.S. Equity 21.62%
Small Cap Equity 18.32%	Large Cap Equity 4.91%	Small Cap Equity 18.37%	U.S. Fixed Income 8.97%	High Yield 26.96%	Small Cap Equity 31.87%	High Yield 18.12%	Large Cap Equity 2.11%	Small Cap Equity 16.38%	High Yield 7.44%
Non-U.S. Fixed Income 12.54%	Small Cap Equity 4.69%	Large Cap Equity 15.79%	Large Cap Equity 5.49%	Small Cap Equity -33.79%	Small Cap Equity 27.87%	Large Cap Equity 15.66%	Cash Equivalent 6.19%	Large Cap Equity 16.90%	Real Estate 3.67%
High Yield 16.32%	Cash Equivalent 3.07%	High Yield 11.89%	Cash Equivalent 4.90%	Large Cap Equity 26.47%	Large Cap Equity 24.47%	Non-U.S. Equity 8.86%	Small Cap Equity -4.18%	High Yield 14.81%	Cash Equivalent 9.27%
Large Cap Equity 19.89%	High Yield 2.74%	Non-U.S. Fixed Income 8.16%	High Yield 1.87%	Non-U.S. Equity -43.89%	Non-U.S. Fixed Income 7.62%	U.S. Fixed Income 6.64%	Real Estate 4.46%	U.S. Fixed Income 4.21%	U.S. Fixed Income -2.67%
U.S. Fixed Income 4.34%	U.S. Fixed Income 2.43%	U.S. Fixed Income 4.85%	Small Cap Equity -1.87%	Real Estate -48.21%	U.S. Fixed Income 8.92%	Non-U.S. Fixed Income 4.85%	Non-U.S. Equity -12.21%	Non-U.S. Fixed Income 4.69%	Emerging Market Equity -4.88%
Cash Equivalent 1.82%	Non-U.S. Fixed Income -4.69%	U.S. Fixed Income 4.32%	Real Estate -7.39%	Emerging Market Equity -43.32%	Cash Equivalent 6.21%	Cash Equivalent 9.12%	Emerging Market Equity -14.42%	Cash Equivalent 6.11%	Non-U.S. Fixed Income -3.89%

Periodic Table of Investment Returns



Do You Know Your Risk Profile?

SKILLS & SERVICES

Who we are & what we do

Financial Planning 90%

Fiduciary Services 80%

Wealth Management 80%

Fee Only Services 70%

Financial Planning

Wealth Management

Fiduciary Services

Fee Only Services

Financial planning is defined as devising of a program for the allocation and management of finances and capital through budgeting, investment, etc.

Contact Us

Your Name (required)

Your Email (required)

Your Phone (required)

Preferred method of contact (required)

Email Phone

Send

Connect with us



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