



SMAs for Financial Advisors

A successful relationship between advisor and client depends on a mutual understanding and comfort of how their money is being managed. This helps your clients commit to long term investing and avoid chasing performance.

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Environmental Social & Governance ESG

Socially Responsible Investing, also known as socially conscious, “green” or ethical investing, goes a step further by actively eliminating investments based on specific ethical guidelines. For example, our portfolios will eliminate companies with exposure to alcohol, tobacco and hand guns.

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Women and Baby Boomers

Women are an increasingly important part of American business culture and society and are rapidly becoming more prosperous members of society as well.

At CAIM we understand the psyche and the needs of the American woman and can craft investment portfolios specific to those needs.

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ESG White Paper

The investment management industry has had a surge of interest in the concept of ESG investing. This has been driven by individual investor desires to incorporate ‘responsible’ factors of Environmental (E), Social (S), and Governance (G) into their investment decisions.

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