

A wealth and investment management firm
that works for you.



Financial Guidance

Think of us as your investment sherpas, providing experienced guidance to help you reach the summit of your financial goals.



Personalized Strategy

We tailor our investment strategy to fit the unique needs and goals of the affluent individuals, families and select institutions we serve.



Portfolio Management

We utilize a disciplined academic approach based on empirical studies to construct & manage globally diversified portfolios.

Evidence-based Investing is our specialty.

Carswell takes an “evidence-based” approach to constructing and managing client portfolios. We believe that by approaching investing more like a science, we can make better informed investment decisions for our clients.

LEARN MORE →

We're here to help you make the most of your wealth.

Our expert team of financial advisors construct and manage highly personalized portfolios using a well-defined, disciplined investment philosophy, complemented with attentive client service and communication.

MEET THE TEAM →

Schedule a call with us to discuss your needs.

CONTACT US →

World-class financial services, unique to your goals.

Whether you are preparing for retirement, planning your family's legacy, or positioning your business for success, our dedicated team of advisors will work closely with you to construct the right plan to help you reach your financial goals and objectives.

[OUR SERVICES →](#)

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