



CARTER ASSET MANAGEMENT, INC.  
*Registered Investment Adviser*

([HTTP://WWW.CARTERASSET.COM](http://www.carterasset.com)),

# CARTER ASSET MANAGEMENT

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Carter Asset Management was established in 1997 as an independent, fee-only, Registered Investment Advisor located in Abilene, Texas. We specialize in comprehensive wealth management and personal financial planning for individuals, families, and small business owners.

[MEET OUR TEAM \(/ABOUT/MEET-THE-TEAM.HTML\)](/ABOUT/MEET-THE-TEAM.HTML)

fi360<sup>®</sup>

**INDEPENDENT**

We offer customized, non-proprietary solutions solely in our clients' best interests.

[READ MORE \(/ABOUT/WHY-CHOOSE-US.HTML\)](/ABOUT/WHY-CHOOSE-US.HTML)

Fee  Only

### **FEE-ONLY**

Unlike many advisors, we do not sell any products and never receive sales commissions.

[READ MORE \(/ABOUT/WHY-CHOOSE-US.HTML\)](/ABOUT/WHY-CHOOSE-US.HTML)



### **COMPREHENSIVE**


We have the experience and expertise to understand the big picture.

[READ MORE \(/SERVICES/WEALTH-MANAGEMENT.HTML\)](/SERVICES/WEALTH-MANAGEMENT.HTML)

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# **COMPREHENSIVE FINANCIAL PLANNING**

**CASH & DEBT MANAGEMENT**

 [more \(/services/cash-debt-management.html\)](/services/cash-debt-management.html)


Managing the monthly budget and properly financing homes, cars, and other assets are critical to successful long-term financial planning.

## **INVESTMENT MANAGEMENT**

 [more \(/services/investment-management.html\)](/services/investment-management.html)


We believe long-term investing in the global economic marketplace in an appropriately diversified portfolio is the proven way to grow wealth successfully.

## **INSURANCE PLANNING**

 [more \(/services/insurance-planning.html\)](/services/insurance-planning.html)

We do not sell insurance, but we help to make sure our clients and their families are adequately protected and represented by independent insurance agents.

## **RETIREMENT PLANNING**

 [more \(/services/retirement-planning.html\)](/services/retirement-planning.html)

You can know today how much you need to be saving each month to have the kind of retirement you desire and whether or not you are on track to achieve your goal.

## **TAX PLANNING**

 [more \(/services/tax-planning.html\)](/services/tax-planning.html)

Our team includes four CPAs who understand the complicated U.S. Tax Code and its implications to successful long-term investing and planning.

## **ESTATE PLANNING**

 [more \(/services/estate-planning.html\)](/services/estate-planning.html)

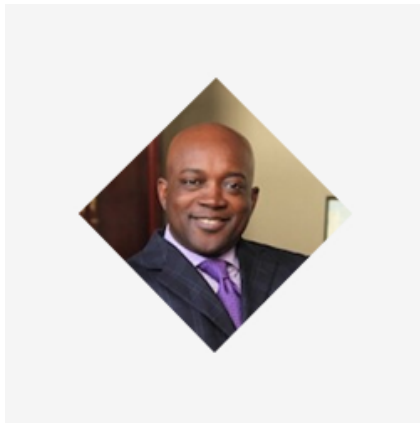
We work with experienced attorneys to ensure our clients accomplish their individual estate planning goals in the most tax-efficient methods possible.

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# **OUR VALUES**

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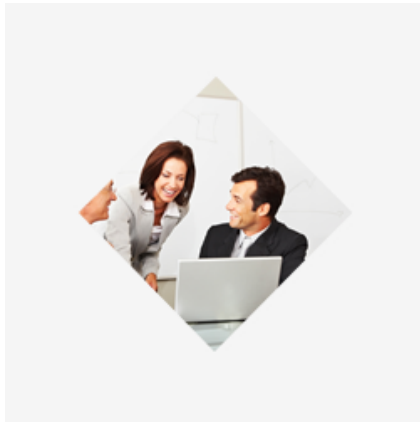
Our purpose is to assist our clients in stewarding their resources to accomplish their unique and individual financial goals. We measure our success by the success of our clients.



## **CLIENT-FOCUSED**

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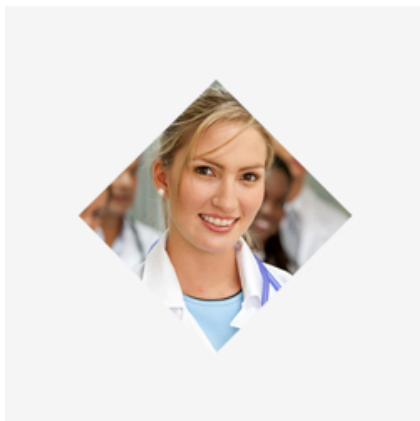
Individualized attention



## **SERVICE-MINDED**

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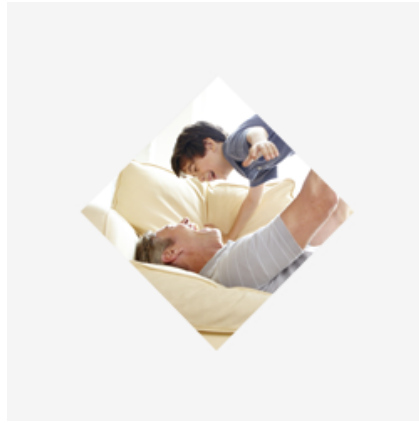
Our ministry is serving our clients



## **PURPOSE-DRIVEN**

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Helping you accomplish your goals



## RELATIONSHIP-BASED

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Money is about more than dollars and cents

## GET IN TOUCH

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Carter Asset Management

242 Beech St., Abilene, TX 79601 / [Get route](#)

<https://www.google.com/maps/place/Carter+Asset+Management+Inc/@32.451732,-99.739394,17z/data=!4m7!1m4!3m3!1s0x86568e166d7a9b7d:0xf78e80f4e3051508!2sCarter+Asset+Management+Inc!3b1!3m1!1s0x86568e166d7a9b7d:0xf78e80f4e3051508?hl=en>

(325) 673-6171 / [info@carterasset.com](mailto:info@carterasset.com)

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[complimentary 'get acquainted' meeting \(/contact.html\)](#)

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