Conrad Capital Management specializes in helping clients plan for their financial future and reach their goals as soon as possible. Since CCM is an independent Registered Investment Advisory firm, its only allegiance is to its clients. CCM has a fiduciary duty to act with the client's best interest in mind.

Through the Registered Investment Adviser all accounts are managed on a fee basis. CCM has legal and moral obligation to act with the customers best interest in mind.

Our goal is to deliver the highest possible standard of fiduciary care and highly customized portfolio management.

Since 1998, Conrad Capital Management (CCM) has functioned as a Registered Investment Advisor firm, offering investment counseling to families across the country. A Registered Investment Advisor is a professional firm that offers personalized financial advice to its clients and is registered with the Securities and Exchange Commission or state securities regulators, subject to the Investment Advisers Act of 1940, and have a fiduciary duty to act in the best interest of their clients. CCM was founded by Donald E. Conrad, President and CEO, who has over 36 years of experience within the financial services industry. He and his team works with complex portfolios and addresses unique needs that require a highly customized level of investment management strategy. Donald Conrad helps clients with complex financial needs, he makes a wide universe of products and services available to them. Services CCM provides are based on what's best for you!

Get advice for your complex needs!

We pride ourselves on strong personal interaction and dedication to needs. At CCM, our philosophy is based on risk management. We focus on **matching the level of risk that you are willing and able to tolerate** with the portfolio which can most efficiently achieve your desired goals. We do not offer a "cookie-cutter" product. There is no "model portfolio" or boilerplate list of stocks that you are forced into. We design a portfolio which is strategically aligned with your objectives for return and risk, as well as the investing constraints that you face. We believe that our independence is key to offering investment advice based on what's best for our clients.

most important decisions regarding your investments that you can make. You need to be able to trust that your advisor has your account's best interests in mind.

Conrad Capital Management's goal is to help finding solutions that are closely aligned with client needs and objectives. We enjoy a deep, personal relationship with our investors. This often takes regular ongoing interactions.

Where is your money held?

We use an institutional custodian to hold and safeguard our client's stocks, mutual funds, ETFs and alternative assets.

advantages. Its simple and easy to understand, helping to avoid surprises. It also gives us an incentive to grow your assets because when you succeed, we succeed.

The right advisor does what's right for you!

This information is designed to provide a general overview with regard to the subject matter covered and is not state specific. The authors, publisher and host are not providing legal, accounting or specific advice to your situation.Conrad Capital Management, Inc.

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