



**TRADEMARK**  
FINANCIAL MANAGEMENT



Welcome to Trademark Financial Management  
Freeing you to do More

Trademark Financial Management, LLC is an investment management and consulting firm located in Edina, Minnesota. Mark Carlton, Chartered Financial Analyst®, and his staff's goal is to deliver focused investment management to financial professionals. It is our mission to give you the freedom to focus on what matters most to you, your clients, and your business. Trademark serves clients throughout the United States.



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Our Philosophy



## Team

Our team of four is highly collaborative, flexible and able to think outside the box. Our availability, and approachability, make it feel like we're your in-house money manager.



## Process

Our focus is on risk adjusted returns. While keeping a vigilant eye on minimizing downside risk, we design portfolios for long term capital appreciation appropriate to your clients' risk tolerance.



## Services

As an investment management and consulting firm, we're working behind the scenes to provide the same cutting edge technology and services you would, if you had the time and expertise to handle it all yourself.

## Latest Tweets

@Playrix What's the point? I could never beat the honey level.



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The markets are being driven by the narrative that 1) the Federal Reserve is on hold indefinitely 2) a trade deal w... <https://t.co/tj3VEbE6HJ>



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In two months the investment climate has gone from risk-off to risk-on. Crazy how fast things can change. <https://t.co/ywcPq4MLo0>



## Latest Blogs

**Market Perspective for 6/28/19**

The S&P 500 is up close to 4% since the last Update and about 6.5%...

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### **Quarterly Perspective for Q1 2019**

Summary Stocks rebounded sharply in the first quarter as investors reacted favorably to the Federal...

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### **Trademark Market Perspective for 3/18/19**

The Great Bull Market The bull market began on March 9th, 2009, so at this...