Welcome To

CMH Wealth Management

Trusted Advice to Help Protect and Grow your Financial Future

Brian Carolan

CFA®

—

Portfolio Manager

Kristen Hanley

.

—

Portfolio Manager

Karen McCloskey

CFP®, CPWA®

—

Wealth Advisor

John Fredette

CFA®

—

Portfolio Manager

Thomas Burleigh

CFP®

—

Wealth Advisor

Meet The Rest of Our Team

Our Wealth Management Process

We follow a multi-step, continual process to help you achieve your personal wealth and financial growth objectives

I

Meet

In an initial meeting we seek to understand your needs and values around your financial future

II

Listen

We listen first. Listening allows us to more effectively understand and develop a customized wealth solution that works for you. We ask many probing questions, listen actively, and evaluate your current situation.

III

Advise

Knowing your personal goals and preferences allows us to be a trusted sounding board for many personal financial decisions including creating an Asset Allocation Strategy that balances risk and reward

IV

Implement

After we have an approved plan of action, we will then, with full discretionary authority, implement your personal financial strategy. Implementation includes setting expectations, communicating

V

Communicat

We review and monitor portfolios continuously and communicate regularly on progress and performance.

timeframe to invest, and executing your investment strategy.

Our Services

At CMH, alongside our core investment management services, we also offer trusted advice and guidance on many other related topics.

Learn more about what CMH Wealth can do for you. Click below to view our complete list of services

- Investments
- Estate Planning Review
- Risk Management Review
- Retirement Income and Planning
- Family Transitions

View Our Services

We're Here For You

Get in Touch with us at Any Time

(603) 379-8161