

OVERVIEW

CSM Capital Corporation offers unconflicted, bespoke asset management services to a select number of U.S. and offshore families.

We seek to generate superior after-tax, after-fee investment returns utilizing efficient investment vehicles, many of which we use for our own families. This creates an appropriate alignment of interest between our clients and ourselves.

Our Investment Committee is comprised of individuals with senior experience in capital markets and investment banking as well as wealth management. We believe this combination to be unique.

We believe the working knowledge of markets and securities gleaned from this mix of backgrounds gives us a different perspective on investing and risk than that of firms who are more orientated to asset gathering and new business generation.

We are extremely proud of our near perfect record of client and employee retention and look to this metric as a measure of success—not new client acquisition. Our ratio of client-facing investment professionals to clients is amongst the highest in the industry.

We are employee owned and will remain so.

We remain surprised that much of our industry invests clients' portfolios in internal, expensive products and receives fees to place third party investments in portfolios. To us this is a violation of our philosophy which is based on a high standard of ethics and trust. Objectivity and conflict-free advice are central to our practice.

All information on this website is for informational purposes only. It is not intended to be, and should not be construed as, advice, legal or otherwise. You are solely responsible for evaluating the merits and risks of the use of the information on this website. Please consult your legal or compliance counsel prior to the use of this information.