



Our Story

Our Team

Professional
Development

Recognitions &
Accomplishments

Services



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Our leadership, expertise, and support empower families, businesses, and non-profit organizations to take great care of their total financial situation – now and in the future.

Take charge of your financial future today.

Professional financial services to help you reach your goals.





How can McKinley Carter help you?

Our **Retirement Plan Services** are more, complex, and execution than **Nonprofit Advisory** services can help you manage your financial assets to manage the threats, honor the obligations, and maximize the opportunities around you -- now and in the future.

How We Can Help You



McKinley Carter Becomes First West Virginia Investment Firm to Earn Fiduciary Excellence Certification

Why work with a CEFEX advisor v2



CEFEX, the Centre for Fiduciary Excellence, LLC, an Fi360®, Inc. company, has certified McKinley Carter Wealth Services, to the standard described in the handbook “Prudent Practices® for Investment Advisors”. McKinley Carter joins the elite group of Investment Advisors to successfully complete the independent certification process.

CEFEX® provides an independent recognition of a firm’s conformity to a defined Standard of Practice. It implies that a firm can demonstrate adherence to the industry’s best practices, and is positioned to earn the public’s trust. This registration serves investors who require assurance that their investments are being managed according to commonly accepted best practices. To learn more, visit our [Retirement Plan Services Page](#).



“InvestmentNews is pleased to recognize firms with supportive cultures where advisers can thrive and are empowered to provide their clients with the best possible investment and financial planning advice...They are role models for other firms in the industry who are striving to improve their own human resource policies and practices.”

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