

Wealth Management Simplified

Callan Capital is an independent wealth management firm that offers financial planning and asset management solutions for families, executives, entrepreneurs, endowments, and foundations.



FINANCIAL PLANNING

Our team of certified, and registered professionals, is trained to develop and implement financial planning strategies specifically designed for executives and business owners. We strive to provide our clients peace of mind knowing their wealth is in good hands.

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INVESTMENT MANAGEMENT

We believe wealth is created through successful participation in the global markets, not speculation. Our mission is to deliver risk-adjusted performance and enhanced returns through tactical, model-driven portfolio design.

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There is a Better Way

Callan Capital was founded in 2007 as a Registered Investment Advisor to bring clarity, direction and discipline to the financial choices you make every day.

After 15 years of working for a large brokerage firm, brothers Tim, Trevor and Ryan had a vision. Having launched a dedicated

Jim, Trevor, and Ryan had a vision. Having launched a dedicated high net worth division at their firm, they knew there was a better way to provide financial advisory services. They felt their clients could be better served through the fiduciary model – since fiduciary advisors are legally bound to act in their clients’ best interest by providing independent, objective advice.

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A ROADMAP FOR LIQUIDITY EVENTS



Our clients have typically experienced a financial event such as the sale of a business, a public offering of their company, divorce, or have accumulated assets over many years. At Callan Capital, we work to provide a financial planning roadmap to navigate these types life and business events, while aiming to provide peace of mind and direction.

[WATCH THE VIDEO](#)

3 CRITICAL CONSIDERATIONS TO ASK IN A LIQUIDITY EVENT

We’ve prepared a liquidity event guide that covers the process before, during, and after the transaction. This will help us build a financial plan with a goal of providing you with confidence in every step of the transition.

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In last week's meeting between Presidents Trump and Xi at the G-20, both sides agreed to resume negotiations and hold...

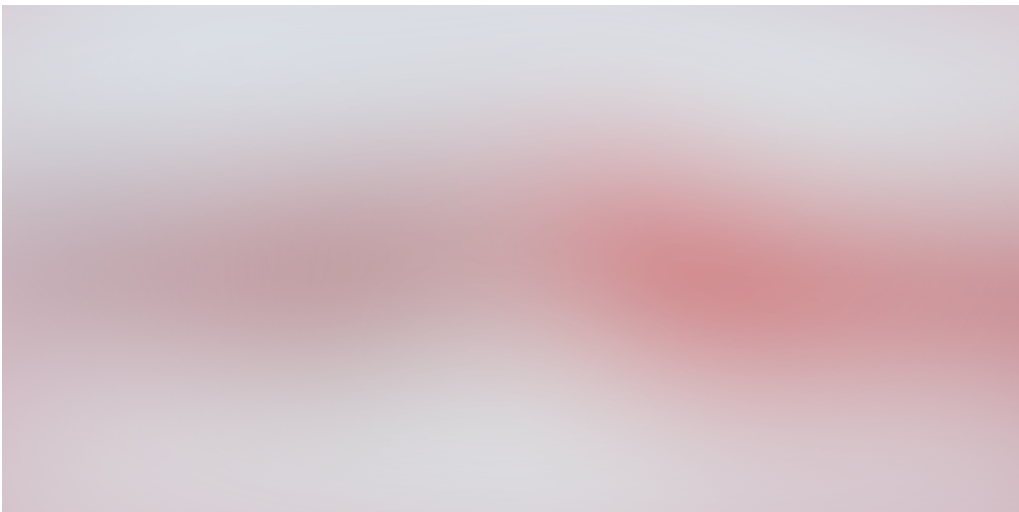
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