

# CARTER FINANCIAL MANAGEMENT

WEALTH MANAGEMENT FOR THIS GENERATION AND THE NEXT



Pictured from left to right: **Bill Carter**, CFP®, ChFC, CLU®, President, **Tom McIntire**, CFP®, CLU®, CFA, Vice President, **Kathy Muldoon**, CFP®, Senior Vice President, **Tara Scottino**, CFP®, Senior Vice President, **Patty Hammond**, CFP®, Financial Planner, **Robert H. Berg**, CFP®, Senior Vice President and Director of Corporate Services.

At Carter Financial Management (CFM), we share your passion to sustain financial independence. For more than 30 years, our planners have helped high-net worth clients and their families during the wealth accumulation and distribution phases of their lives.

CFM understands that managing wealth is both a collaborative and customized process that is clearly defined by one's circumstances and personality. This approach requires monitoring and fine-tuning; however, few individuals have the time or discipline to focus on financial planning and asset management. CFM offers well-qualified advisors and planners who collectively offer more than 189 years of wisdom and experience.

With branch offices in Houston, Chicago and Midland, CFM continues to meet the financial and professional needs of a diverse group of clients, including executives, business owners, physicians, attorneys, widows and retirees. We offer unparalleled service, expertise and client education.

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