



Company Background

ABOUT CARLSON CAPITAL MANAGEMENT

Founded in 1986, Carlson Capital Management, Inc. (CCM) is a comprehensive wealth management firm with Minnesota offices in Northfield, Hastings, Bloomington and Rochester. Managing more than \$800 million in assets and serving a select group of 500 clients in Minnesota and throughout the country, CCM brings together in one place the key disciplines of investment, estate, tax, insurance, retirement and philanthropic planning, to provide fully integrated wealth management. The firm serves high-net-worth individuals and families, business owners and non-profit organizations.

The Carlson Capital Management approach to wealth management is rooted in the integration of key financial disciplines. Rather than providing advice focused solely on investments, clients receive integrated advice from a team of experts. The result for CCM clients is a greater sense of control and understanding, confidence that each facet of wealth is coordinated and optimized, and most importantly, peace of mind.

The Carlson Capital Management investment philosophy is based upon academic research and the belief that markets are efficient. This approach removes emotion, mitigates risk, captures global market returns and drives the success of clients' wealth management plans. CCM's independent, fee-based structure ensures the highest levels of objectivity, integrity, and fiduciary responsibility rooted in an ethical, transparent relationship.

The firm's deep commitment to each client is built upon foundational values like honesty, hard work and a strong sense of personal dedication. Clients can expect service that is rooted in experience and expertise, delivered in an atmosphere of care. The team at CCM has never taken for granted that clients entrust the firm with far more than their assets. For twenty-five years, Carlson Capital Management has been a trusted advisor for clients seeking competent, comprehensive advice and management of their financial lives. Our client partnerships endure over the years because in the end what the team at CCM cares most about is making a difference in the lives of our clients.

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