



## Welcome to Carpion Private Wealth.

After spending decades at one firm, we are excited to launch our independent wealth management firm as a means of helping clients build, manage and protect their wealth with the specific goal of passing on a legacy from one generation to the next.

In order to deliver a seamless and comprehensive wealth management experience, we determined that we would need the freedom, flexibility and control that comes with being independent. So Carpion Private Wealth was borne from our commitment to serve our clients' financial well-being – driven by the belief that **DOING THE RIGHT THINGS, IN THE RIGHT WAY**, is critical to our mutual success.

The name of our new firm is a reference to an ancient Greek architectural theorist – inspiration that our client-centric services will give you the confidence that your “financial house” has been well-built and is being well-managed.

We would be honored to continue our relationship as your wealth advisor. We believe that you will benefit further through our systematic process and highly personalized approach to developing and implementing financial plans, quarterly reviews and unique investment strategies. As an independent firm, we can now access best-in-class research, technology and advisory solutions from a wide variety of financial partners to meet your family's ever-changing needs.

Among those resource providers we can now work with, we have chosen **BNY (Bank of New York) Mellon | Pershing** to serve as our custodian, safeguarding our clients' assets. BNY Mellon custodies over \$40 Trillion and is the longest standing operating bank in the U.S., surpassing 235 years. We're also a partner firm of **Sanctuary Wealth**, a leading platform for independent advisors that provides us with the technology, systems and cybersecurity that runs our back office.

With this support and commitment, Carpion Private Wealth is well positioned to give you the care and attention you deserve, as we offer the solutions and strategies that can make a difference in your life.

Please visit our new website ([www.carpionprivatewealth.com](http://www.carpionprivatewealth.com)) to learn more about how we can serve as the personal architect for your financial future – built on a foundation of smart, process-driven wealth management.

Please call or email us today to schedule an appointment to discuss becoming a client of Carpion Private Wealth.

Sincerely,

**Eric A. Cardenas**  
*Managing Director, Partner, Founder*

**Amanda M. Madrigale**  
*Senior Vice President, Partner, Founder*

**Dan G. Croonquist**  
*Senior Vice President, Partner, Founder*