CARSON WEALTH

RON CARSON, CFP®, CHFC®

Founder and CEO

Ron Carson is Founder and CEO of Carson Wealth, one of the largest wealth advisory firms in the country, serving clients through holistic financial planning, disciplined investment strategies and proactive personal service. In 1993, Ron launched Peak Advisor Alliance as a way to share his insights and formulas for growing an exceptional advisory practice. Ron also founded Carson Institutional Alliance, a partnership that equips elite advisors with the tools they need to communicate with their clients on a deeper level including co-sourced investment management, an integrated marketing strategy & customized materials, an on-demand succession solution and more.

Ron first began honing his core principles while working from his dorm room at the University of Nebraska in 1983: a tenacious focus on serving clients' best interests; a relentless pursuit of excellence across every activity; and a burning desire to learn, grow intellectually and innovate. These driving have led Ron to become LPL Financial's top-ranked registered representative for 23 consecutive years. He has also received countless other accolades, including top 10 rankings annually from *Barron's* and *Registered Rep* magazine.* Most recently he was inducted into Barron's inaugural Hall of Fame.* He is one of the most celebrated and respected financial advisors and executives in the industry — and is a sought after speaker, thinker and investment strategist.

In the spring of 2012, Ron continued to expand his industry leadership by co-founding aRIA, a "think-tank" study group comprised of six elite RIA firms, and Advisor Growth Strategies, a leading consulting firm serving the wealth management industry. As a member of the Financial Advisor Council of CNBC, Ron also writes guest columns and provides insight and frontline perspective to the CNBC Digital news team. In 2014, Ron joined The American College of Financial Services board of trustees. The College offers turnkey programs that produce effective advisors who are able to join a team and make an impact immediately, helping the industry by adding capacity and building our next generation of advisors. Ron's academic credentials include being a Certified Financial Planner® and a Chartered Financial Consultant. He holds the NASD Series 7, 24, 63, and 65 licenses.

Ron is also actively involved in the community. He and his wife, Jeanie, founded The Dreamweaver Foundation, a non-profit organization dedicated to fulfilling end-of-life dreams for seniors with terminal illnesses. He also founded the American Charitable Foundation – a foundation established for a more efficient disposition of charitable assets and served as a past President of the Child Saving Institute.

Ron has shared his success principles, as documented in his book, *Tested in the Trenches*, with audiences worldwide. He also coauthored the *New York Times* best-selling book *Avalanche*, and the blueprinting process that goes with it.

Ron and Jeanie reside in Omaha and have three wonderful children, two dogs and a cat. He enjoys spending time with his family, collecting and drinking wine, golfing, flying, pheasant hunting and he's an avid Nebraska Cornhusker fan.

*Barron's magazine, October 20, 2014 issue. The Barron's rankings are based on data provided by over 4,000 of the nation's most productive advisors. Factors included in the rankings: assets under management, revenue produced for the firm, regulatory record, quality of practice and philanthropic work. Investment performance isn't an explicit component because not all advisors have audited results and because performance figures often are influenced more by clients' risk tolerance than by an advisor's investment-picking abilities.

*Registered Rep Magazine, August 2010 issue. The ranking, as identified by Registered Rep, reflects the assets under management using the Discovery-RR database system. Discovery is an online database of financial service intermediaries by the Financial Information Group of Shrewsbury, NJ. Discovery maintains data on the registered rep universe then validates the ranking via direct survey.

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