



Paul Carlson, CIMA®, CRPC®

Co-Founder, Partner

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Paul is a Co-Founder of Seventy2 Capital and oversees the practice's investment selection and allocation process to help clients realize their life goals by providing independent, thoughtful financial advice, and the highest level of service. As a husband, father, and entrepreneur, he intimately understands the multitude of financial decisions his clients face each day and throughout their lives. His clients are business owners, corporate and non-profit executives, high net worth individuals and families who rely on him for advice and strategies to build and protect their financial legacy. They benefit from his extensive knowledge of economics, financial markets, tax policy and public policy gained during a career that has spanned both Wall Street and Main Street.

Paul has been named a Five Star Wealth Manager* in the Washington D.C area for six consecutive years from 2015 to 2020. He has also earned the Certified Investment Management Analyst® (CIMA®) and the Chartered Retirement Planning Counselor(SM) (CRPC®) designations. Paul has also been recognized from 2017-2022 by Wells Fargo Advisors Financial Network (WFAFN) as a Premier Advisor**.

Prior to Seventy2 Capital, Paul spent a combined 15 years as a financial advisor in the wealth management practices of Morgan Stanley and Merrill Lynch. He honed his understanding of public markets early in his career as an analyst in the Institutional Mortgage Sales Group of Lehman Brothers. Following graduate school in 1998, he was elected to the Maryland House of Delegates where he served as a member of the Ways and Means Committee and the Education Subcommittee.

Paul holds a Master in Public Policy from Harvard University's Kennedy School of Government and a Bachelor of Arts with honors in Economics from the University of Maryland (UMD). At UMD, he served as President of the Student Government Association and was a recipient of the H.C. Byrd Leadership Award, a member of Omicron Delta Kappa (ODK), The National Leadership Honor Society, and the founder and President of the UMD Habitat for Humanity Chapter. As a passionate outdoorsman, Paul is the lead explorer on family hikes and camping adventures locally and around the world.

* This award was issued on September 1, 2020 by Five Star Professional (FSP) for the time period January 27, 2020 through August 21, 2020. Wealth managers do not pay a fee to be considered or placed on the final list of Five Star Wealth Managers. The award is based on 10 objective criteria. Eligibility criteria – required: 1. Credentialed as a registered investment adviser or a registered investment adviser representative; 2. Actively licensed as a registered investment adviser or as a principal of a registered investment adviser firm for a minimum of 5 years; 3. Favorable regulatory and complaint history review (As defined by FSP, the wealth manager has not; A. Been subject to a regulatory action that resulted in a license being suspended or revoked, or payment of a fine; B. Had more than a total of three settled or pending complaints filed against them and/or a total of five settled, pending, dismissed or denied complaints with any regulatory authority or FSP's consumer complaint process. Unfavorable feedback may have been discovered through a check of complaints registered with a regulatory authority or complaints registered through FSP's consumer complaint process; feedback may not be representative of any one client's experience; C. Individually contributed to a financial settlement of a customer complaint; D. Filed for personal bankruptcy within the past 11 years; E. Been terminated from a financial services firm within the past 11 years; F. Been convicted of a felony); 4. Fulfilled their firm review based on internal standards; 5. Accepting new clients. Evaluation criteria – considered: 6. One-year client retention rate; 7. Five-year client retention rate; 8. Non-institutional discretionary and/or non-discretionary client assets administered; 9. Number of client households served; 10. Education and professional designations. FSP does not evaluate quality of services provided to clients. The award is not indicative of the wealth manager's future performance. Wealth managers may or may not use discretion in their practice and therefore may not manage their clients' assets. The inclusion of a wealth manager on the Five Star Wealth Manager list should not be construed as an endorsement of the wealth manager by FSP or this publication. Working with a Five Star Wealth Manager or any wealth manager is no guarantee as to future investment success, nor is there any guarantee that the selected wealth managers will be awarded this accomplishment by FSP in the future. 2535 Washington, D.C. wealth managers were considered for the award; 115 (5 percent of candidates) were named 2020 Five Star Wealth Managers. Visit www.fivestarprofessional.com. Self-completed questionnaire was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria.

Award issued on October 1, 2019 by Five Star Professional (FSP) for the time period December 31, 2018 through August 9, 2019. 1956 Washington, D.C. wealth managers were considered for the award; 122 (6% of candidates) were named Five Star Wealth Managers.

Award issued on October 1, 2018 by Five Star Professional (FSP) for the time period February 1, 2018 through August 24, 2018. 1975 Washington, D.C. wealth managers were considered for the award; 100 (5% of candidates) were named Five Star Wealth Managers.

Award issued on October 1, 2017 by Five Star Professional (FSP) for the time period February 8, 2017 through August 22, 2017. 1417 Washington, D.C. wealth managers were considered for the award; 106 (7% of candidates) were named Five Star Wealth Managers.

Award issued on August 1, 2016 by Five Star Professional (FSP) for the time period March 2, 2016 through August 30, 2016. 1665 Washington, D.C. wealth managers were considered for the award; 208 (12% of candidates) were named Five Star Wealth Managers.

Award issued on September 1, 2015 by Five Star Professional (FSP) for the time period February 14, 2015 through August 10, 2015. 1837 Washington, D.C. wealth managers were considered for the award; 227 (12% of candidates) were named Five Star Wealth Managers.

** UPDATE – The Premier Advisor distinction is held by a select group of Financial Advisors within Wells Fargo Advisors Financial Network as measured by completion of risk and compliance training, business production based on the past year, and professionalism. Net asset flow (NAF) may also be used to determine recipients.