



Paul Carlson, CIMA[®], CRPC[®]

Chief Executive Officer & Co-Founder

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Paul is the Chief Executive Officer (CEO) and Co-Founder of Seventy2 Capital. He is responsible for ensuring that Seventy2 Capital supports its clients, staff, and financial advisors to help manifest their most important financial goals. In addition, Paul establishes and executes Seventy2 Capital's organizational strategy with the ultimate goal of providing the highest level of client service. Lastly, Paul serves on the Investment Committee for Seventy2 Capital's custom investment strategies.

Paul also serves as a financial advisor. In this role he supports clients to 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.

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 earned the Certified Investment Management Analyst[®] and the Chartered Retirement Planning Counselor (SM)[®] designations. He holds a Master's 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.

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