Michael Carson, CFP®, CIMA®, CRPS®

Partner, Financial Advisor
Hurlow Wealth Management Group, Inc.

Speaker Bio

Mike Carson has over seven years of experience developing strategies that help clients build, manage, preserve, and transition their wealth. Mike focuses on working with clients who have complex financial lives with several moving parts. Through the Coordinated Financial Overview™ (CFO) process, Mike helps clients simplify, organize, and coordinate all aspects of their financial affairs and guides them to smart financial decisions that move them closer to their ultimate personal and financial goals.

Mike started his career with Hurlow Wealth Management Group in 2008. Since then, Mike has studied for and achieved several professional designations, including:

- CFP® - CERTIFIED FINANCIAL PLANNER™
- CIMA® - Certified Investment Management Analyst®
- CRPS® - Chartered Retirement Plan Specialist™
- Series 7, 66 registrations
- Indiana Life and Health insurance license

Mike and the team at Hurlow Wealth Management Group provide wealth management services to business owners, corporate executives, professors, physicians, retirees, and other individuals and families with complex financial situations. Through the Coordinated Financial Overview™ (CFO) process, the team helps clients oversee and coordinate all aspects of their financial affairs, including: investment portfolio management, cash flow and budgeting, retirement savings and income planning, college planning, estate strategies and wealth transfer planning, insurance and risk management, and investment related tax planning.

In addition, Mike and the team focus on providing retirement plan consulting services to businesses through the Coordinated Fiduciary Overview™ (CFO) process. Through this process, the team guides the fiduciaries of corporate retirement plans in providing a plan to employees that stays in compliance with fiduciary rules and regulations from the DOL and IRS.

Mike is a member of several professional organizations including the Estate Planning Council of Indianapolis, the Financial Planning Association, and the Investment Management Consultants Association®.